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ABSTRACT

This survey of Association of Research Libraries (ARL) members gathered data on library support staff classification specifications in ARL libraries, the process for classifying these positions, and salary and title comparisons with similar positions outside of the library. It also asked when the last classification study was performed within the library, what triggered the process, which was involved, and what the results of the classification study were in both economic and human terms. A copy of tabulated results from the questionnaire is included. Representative documents include job descriptions/specifications from the University of Alabama, University of British Columbia, University of Maryland, Massachusetts Institute of Technology, University of Oregon, University of Saskatchewan, University of Virginia, University of Washington, and Washington University-St. Louis (Missouri). Contains selected resources, including books, journal articles, and World Wide Web sites. (MES)

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SPEC Kit 252

Library Support Staff Position Classification Studies

October 1999

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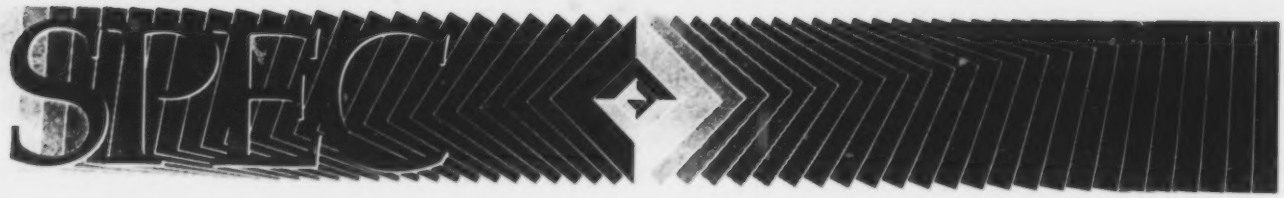

Library Support Staff Position Classification Studies

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October 1999

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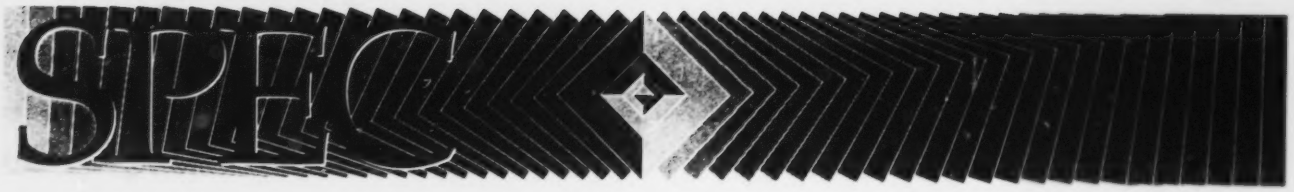

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October 1999

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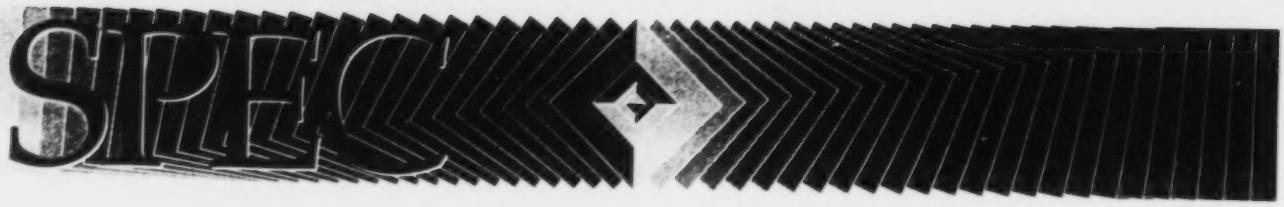

SURVEY

ASSOCIATION OF RESEARCH LIBRARIES
OFFICE OF LEADERSHIP AND MANAGEMENT SERVICES

SPEC Kit 252
Library Support Staff Position Classification Studies

Executive Summary

Introduction

Classification schemes provide a basis for creating new positions, making recruitment and hiring decisions, establishing salary scales, and delineating common standards for performance review and career advancement. A review of the previous SPEC Kits on related topics, *Personnel Classification Schemes in ARL Libraries* (SPEC Kit 85, June 1982) and *Job Analysis in ARL Libraries* (SPEC Kit 135, June 1987), reveals little noticeable change over time in the purpose of job analysis for developing classifications. Libraries, however, have changed.

Technology has brought about a dramatic change not so much in what libraries do, but in how libraries do it. Duties and responsibilities remain essentially the same, but the skills and abilities necessary to accomplish the required tasks have altered. Partly, an institution's software and hardware have made the work more complex. Shared bibliographic information, for instance, has blurred the lines not only between support staff positions (no M.L.S. required) and librarians (M.L.S. required), but among support staff as well. Partly, internal reorganizations have resulted in greater expectations for positions, including the need for continual staff training and upgrading of skills. Staff members in all areas of the library are expected to have a broad understanding of operations throughout the system in order to perform their jobs satisfactorily. As a result, job classifications need to be revised periodically now more than ever to reflect the complexity, impact, and resourcefulness demanded of today's library staff, including support staff.

While the two previous SPEC studies of job classification focused on the differences between research librarian, support staff, and student level positions, this study looked closely at only support staff in an attempt to determine how the levels of this classification group are currently defined and distinguished. The survey gathered data on library support staff classification specifications in ARL libraries, the process for classifying these positions, and salary and title comparisons with similar positions outside of the library. It also asked when the last classification study was performed within the library, what triggered the process, who was involved, and what were the results of the classification study in both economic and human terms.

The survey was distributed to all ARL libraries in June 1999. Of the 122 member institutions, 59 (48%) responded.

Survey Results

Classification Systems. All respondents reported using a position classification system for their library support staff. Ninety-five percent have used a system for eight or more years, while 5% have used a system for the past four to seven years. The levels of support staff positions among libraries vary widely, with the highest percentage (29%) having five levels; 27% have four levels; 14% have three levels; 7% have six levels; and 3% have two levels. Twenty percent indicated a number greater than six levels. The wide range of classification levels may be influenced by outside guidelines since 41 respondents indicated that their classifications must fit into a larger classification scheme imposed

by another system: state system (24%), higher education system (22%), campus system (20%), or other system (34%).

Classification Study Process

Although 18 institutions have performed a classification study within the last three years, 41 have not. In fact, nearly half of the respondents have not performed a study within the last six years—a period of great technological change.

Impetus. Concern over equitable pay levels, both within the larger institution and within the library, was the primary motivator for performing a classification study. Administration and human resource departments were almost equally responsible for driving the study (48% and 44% respectively). A union was least likely to drive a study (10%).

Time Factor. The length of time to complete a classification study can take from as little as six months to more than three years. The average length of time reported by respondents was 22 months. Not surprisingly, there seems to be a correlation between the number of people involved in the process and the length of time a study takes. Other influencing factors, such as the timing of union negotiations, affected completion of some studies as well.

Participants. Representatives from library administration and campus human resources offices comprised the majority of participants involved in a classification study. The numbers for these groups were closely followed by numbers for library human resources officers, supervisors and managers, and department heads. Employees, an appointed committee or task force, and an outside consultant came next. Union involvement was relatively low, but they do have an effect on support staff classifications. Of the 23 libraries (47%) who said support staff were unionized, 50% declared that unionization has an impact on the classification study process.

Point factoring was mainly done by campus human resources or unspecified, other participants, followed closely by library human resources departments.

Methodology. Normally more than one method is used to perform a classification study, but the majority of respondents indicated that a review of previous job descriptions was made. Interviews with supervisors came next in frequency, followed by individual staff reports and desk audits. The use of other methodology accounted for 16 answers.

Criteria. As one might anticipate, the majority of respondents considered the complexity of tasks involved in a position as the first criteria for distinguishing between classification levels. This was closely followed by increased independence in decision making and supervisory responsibilities. Technical expertise in a particular area and advanced subject knowledge of a particular area or collection were also important factors.

Salary Comparisons

Among U.S. libraries, the 11 respondents with five levels of support staff had salary ranges from a minimum of $1,284 per month to a maximum of $3,524 per month. The average minimum was $2,006 per month; the average maximum was $2,781. For the 16 U.S. institutions with four levels of staff, monthly ranges ran from a minimum of $965 to a maximum of $5,696. The average minimum was $1,846, and the average maximum was $2,817. For the seven U.S. institutions with three levels of support staff, $1,031 was the minimum end of the range per month and $3,275 the maximum. The average minimum was $1,482, and the average maximum was $2,239. Three responding U.S. institutions do not have maximum ranges.

For the four Canadian institutions with five levels of support staff, the minimum salary per month was $1,662 and the maximum was $4,860. The average minimum was $2,317 and the average maximum was $3,052. (All figures are in Canadian dollars. See charts for specific comparisons.)

When compared to campus, system, or organizational ranges for clerical position classifications, 74% indicated that the salary ranges for library support staff were about the same. Twenty-two percent, however, indicated library classification ranges were higher in general than

clerical salary scales, while 4% indicated library ranges were lower in general.

As could be expected, when respondents compared library support staff salary ranges to campus, system, or organization computer or information technology ranges, 73% considered the library salary ranges to be lower in general. Twenty-seven percent considered the ranges for these classification groups to be about the same, but no one considered library ranges higher in general.

Outcome

The responses for the question concerning the outcome of a classification study support the view that support staff positions have become more complex and important in the library. Twenty-seven respondents (61%) indicated that pay levels were raised as a result of the study, although 17 respondents indicated that there was no change to pay levels. No one indicated pay levels were lowered. Where pay levels were increased, the raises were funded by the library (55%), the parent organization (48%), the state (14%), or another source (3%).

Issues and Trends

It is interesting to examine the terminology used in support staff classifications. Clerical and technical terminology is, for the most part, disappearing. By far, Library Assistant was the most common classification title for library support staff. Some libraries use a combination of library technician and library assistant classifications and/or library supervisor or manager classifications. Much of this is most likely influenced by union representation in those systems. It is also worth noting that the more upper level classifications (such as Library Assistant II through V) are used, instead of lower levels.

One of the greatest, reported needs in revising classification schemes was to account for the importance of interpersonal versus technical skills and the integration of the two skill types. No one type of skill is considered more important now than another, and benchmarks for valuing these position classifications have changed. As noted above under survey results, 29% of all responding libraries use five levels of library support staff. Rather than a trend appearing for the collapse of classification systems, there appears to be an expansion. Perhaps, the greatest trend of all is that libraries recognize the need for an expansion in classification levels in order to cover the complexity and/or variety of duties performed by support staff at the same time that they are willing to pay for the upgrades and reclassifications themselves.

Conclusion

Many institutions still work with outdated library support staff classifications—20-year-old systems in some cases. As a result, these organizations need to deal with equity issues across classification ranks generated by the dated system, changes in computer technology, and a competitive information technology marketplace.

Undertaking a classification study, however, is labor and time intensive, and the process must be tailored to each institution. In preparation for a review of its technician series during the spring of 1999, the University of Oregon Library discovered no current articles or reports by academic or research libraries to serve as a guide. The lack of current information indicates the difficulty of the task.

Based on the experiences of survey respondents who have recently conducted classification studies, however, a library should be the instigator in revamping its system. This ensures the likelihood of establishing classification specifications that accurately reflect the work being performed and fit within appropriate salary schedules, thus attempting to satisfy both employees and the institution.

Survey Results

In the past decade, technology has brought about a dramatic change not so much in *what* we do in libraries, but in *how* we do it. Shared bibliographic information has blurred the lines not only between support staff positions (no M.L.S. required) and librarians (M.L.S. required), but among support staff as well. Internal reorganizing has resulted in greater expectations (including continual training and upgrading of skills) for our staff. Staff members in all areas of the library are expected to have a broad understanding of operations throughout the system in order to perform their jobs satisfactorily. Consequently, job classifications periodically need to be revised to reflect the complexity, impact, or resourcefulness demanded of today's library support staff.

This SPEC survey is designed to gather data on library support staff position classification specifications in ARL libraries, the process for classifying these positions, who is involved in the process, and how salaries compare to other positions outside of the library.

This survey was designed by Laine Stambaugh, Personnel Librarian, and Joni Gomez, Technical Services Law Librarian, at the University of Oregon.

Please submit this survey and send the requested documentation by July 16, 1999. As always, individual responses to the survey will be treated confidentially.

Note: Fifty-nine of the 122 ARL member libraries (48%) responded to this survey.

Background

1. Does your library use a classified position system for library support staff?

Yes	59	
No	0	

If yes, for how many years have you used this system?

0–3	0	
4–7	3	5%
8+	56	95%

2. How many levels of library-specific support staff do you have in your organization? (N=59)

One	0	
Two	2	3%
Three	8	14%
Four	16	27%
Five	17	29%
Six	4	7%
Other	12	20%

What are the library-specific support staff classifications called (i.e., Library Assistant I, Library Technician 2, etc.)?

Titles vary from institution to institution. However, Library Assistant with various ranks appeared most frequently across institutions (108 mentions). Other variations on assistant titles include clerical, technical, staff, bibliographic, and departmental. Other titles used across institutions are Library Technician, Library Clerk, Library Supervisor, and Library Specialist. See Appendix A for a complete list of titles.

3. Do your library support staff classifications fit into a larger classification system scheme (i.e., do classification specifications need to fit positions other than those in your own organization)?

Yes	41	69%
No	18	31%

If yes, is the system:

State	10	24%
Higher education	9	22%
Other campuses	8	20%
City	0	
County	0	
Other	14	34%

Campus or university-wide system
U.S. Office of Personnel Management position classification standards
Union classification system

4. What are the salary pay ranges for your library support staff classifications (i.e., what levels and what monthly minimums and maximums)?

Combined Responses (U.S. Dollars)

Level	Responses	Minimum			Maximum		
		Range	Mean	Median	Range	Mean	Median
1	47	$964–2,401	$1,502	$1,483	$1,433–6,026	$2,317	$2,143
2	47	1,017–2,558	1,646	1,617	1,677–4,327	2,453	2,357
3	46	1,076–3,080	1,854	1,811	1,779–5,214	2,714	2,568
4	41	1,127–3,363	2,103	2,068	1,857–5,696	3,067	2,934
5	25	1,485–2,886	2,275	2,181	2,389–4,632	3,312	3,185
6	13	1,600–2,891	2,238	2,279	2,580–3,937	3,350	3,250

Combined Responses (Canadian Dollars)

Level	Responses	Minimum			Maximum		
		Range	Mean	Median	Range	Mean	Median
1	8	$1,662–2,444	$2,022	$1,982	$1,982–3,455	$2,470	$2,324
2	8	1,827–2,457	2,156	2,167	2,155–3,355	2,746	2,740
3	7	1,939–2,611	2,356	2,451	2,625–4,897	3,320	3,034
4	5	2,107–2,760	2,426	2,468	2,904–3,971	3,210	3,038
5	5	2,030–3,240	2,623	2,586	2,870–4,860	3,512	3,263
6	1	1,944			2,749		

U.S. institutions with three levels of support staff (N=7)

Level	Minimum			Maximum		
	Range	Mean	Median	Range	Mean	Median
1	$1,031–2,162	$1,379	$1,328	$1,433–2,943	$2,059	$2,040
2	1,185–1,875	1,461	1,452	1,677–2,856	2,218	2,267
3	1,372–2,167	1,605	1,508	1,982–3,275	2,440	2,478

U.S. institutions with four levels of support staff (N=16)

Level	Minimum			Maximum		
	Range	Mean	Median	Range	Mean	Median
1	$965–2,401	$1,572	$1,502	$1,572–3,891	$2,430	$2,217
2	1,017–2,558	1,708	1,639	1,686–4,327	2,642	2,439
3	1,076–3,080	1,945	1,883	1,779–5,214	2,939	2,671
4	1,127–3,363	2,158	2,007	1,857–5,696	3,258	3,107

U.S. institutions with five levels of support staff (N=11)

Level	Minimum			Maximum		
	Range	Mean	Median	Range	Mean	Median
1	$1,284–1,932	$1,584	$1,583	$1,737–2,510	$2,138	$2,200
2	1,407–2,206	1,763	1,682	1,970–3,054	2,385	2,386
3	1,535–2,402	1,998	2,019	2,149–3,877	2,725	2,646
4	1,659–2,579	2,218	2,266	2,323–4,318	3,062	2,977
5	1,774–2,886	2,467	2,559	2,572–4,632	3,596	3,524

Note: Three U.S. institutions—two with five levels and one with four—do not have maximum ranges.

5. How do these salary ranges compare to campus/system/organizational ranges for clerical position classifications? (N=55)

Lower in general	2	4%
About the same	41	74%
Higher in general	12	22%

Comments:

Nine of the responding institutions indicated that the pay ranges for library support staff and campus or institutional clerical staff were the same, if not identical. Two respondents indicated some overlap in the classification pay levels, with higher level library positions exceeding clerical positions. One institution indicated ongoing efforts to integrate the two classification pay systems. One institution indicated that clerical pay classifications are slightly lower than library support staff classifications.

6. How do these salary ranges compare to campus/system/organizational ranges for computer/information technology position classifications? (N=56)

Lower in general	41	73%
About the same	15	27%
Higher in general	0	

Comments:

Six institutions indicated that typical system classification ranges tend to be higher than library support staff ranges, although in some cases, there is overlap at the higher library classification levels. Two respondents indicated that the pay ranges for computer-related classifications and library support staff classifications were identical.

7. How many years has it been since your organization last performed a library support staff classification study or overhaul? (N=59)

0–3 years	18	31%
4–6 years	12	20%
7–10 years	8	14%
11+ years	16	27%
Never been done	5	8%

If never done, do you plan to conduct a study in the future?

Yes (please answer question 8)	2	40%
No (please submit survey now)	3	60%

8. What triggered the classification study process? (N=52)

Concern over equitable pay levels		
within the larger organization	26	50%
within the library	22	42%
Administration driven	25	48%
Campus human resources driven	23	44%
Employee driven	10	19%
Union driven	5	10%
Higher education system driven	0	
Other	15	29%

Process also driven by the state or province, board of regents, or university system

Process

9. How long did your entire classification study process take from beginning to implementation? (N=45)

0–6 months	2	4%
7–12 months	7	16%
13–18 months	12	27%
19–24 months	10	22%
25–36 months	6	13%
37+ months	8	18%

10. Who was involved in the classification study process? (N=47)

Campus human resources	37	79%
Library administration	37	79%
Library human resources department	36	77%
Supervisors or managers	35	74%
Department heads	34	72%
Employees	31	66%
Appointed committee or task force	25	53%
Outside consultant	16	34%
Union	8	17%
Other	10	21%

11. What was the order of the above individuals' involvement?

	Responses	Rank	Median
Others	9	1st–3rd	1st
Campus human resources	36	1st–6th	2nd
Appointed committee or task force	22	1st–5th	2nd
Library human resources department	33	1st–9th	3rd
Library administration	33	1st–9th	3rd
Outside consultant	13	1st–8th	3rd
Department heads	31	1st–8th	4th
Supervisors or managers	34	2nd–7th	5th
Union	10	1st–8th	5th
Employees	30	1st–9th	6th

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12. What was the methodology used in the classification study? (N=48)

Review of previous job descriptions	38	79%
Interviewing supervisors	30	63%
Individual staff reports	22	46%
Desk audit	19	40%
Other	16	33%

13. Is your library support staff unionized?

Yes	23	47%
No	26	53%

If yes, did this have an impact on the process?

Yes	11	50%
No	11	50%

Outcome

14. The classification study resulted in:

Raised pay levels	27	61%
No change to pay levels	17	39%
Lowered pay levels	0	

If pay levels were raised, how did your library pay for the increases? (N=29)

Library funded	16	55%
Parent organization funded	14	48%
State funded	4	14%
Union funded	0	
Other	1	3%

15. What criteria or distinguishing features were used to differentiate support staff levels? (N=48)

Complexity of tasks	45	94%
Increased independence in decision making	44	92%
Supervisory responsibilities	38	79%
Technical expertise of a particular area	31	65%
Advanced subject knowledge of a particular area or collection	25	52%
Other	6	13%

- Budget responsibility
- Contacts with public
- Degree of specialization
- Impact of decisions
- Impact of error
- Level of education and experience required
- Nature and level of communications or contacts
- Scope or breadth of responsibility
- Working conditions

16. Who did the actual point factoring for classifications for final determination on pay levels or ranges? (N=46)

Campus human resources	25	54%
Library human resources department	5	11%
None was performed	4	9%
Library administrators	2	4%
Outside consultant	2	4%
Higher education system	0	
Other	15	33%

- Appointed task force
- Board of Regents
- Joint management and union committee
- State human resources or civil service
- University committee

17. Were there any particular aftereffects of the classification study that you would like to comment on (i.e., discord among staff members, classification allocation appeals, union issues, budgetary problems, etc.)?

Most institutions indicated no repercussions that they were aware of. Some of the studies happened so long ago that specific repercussions or results were unknown. One institution reported an improved pay scale for library support staff that resulted in attracting a higher quality applicant. In cases where position classifications were regraded upwards or new levels were created, the library bore the economic cost, but considered it a worthwhile investment for their staff.

Discord among staff members was the most common negative result, with subsequent classification allocation appeals. Some of that discord was based on perceived expectations that were not met (i.e., no salary increase) and a lack of understanding of the process. Some of the staff and department head concerns also involved perceived loss of status when positions in specific units were downgraded. A major concern of four libraries was the lack of input solicited from their managers and staff. In those cases, much of the review was conducted outside of the library and sometimes, outside of the organizational human resources office.

Is there anything you would have done differently?

Four responding institutions indicated that a better orientation or education process might have made the study proceed more smoothly. It was suggested that:

- individuals receive more information at the beginning of the review and continual updates as it progresses;
- priorities and budget realities be communicated early on so that the process does not become bogged down; and
- proper training be provided about the process to all levels so that expectations and outcomes are clear.

One of the most common complaints was the length of time needed to complete the study. This protracted amount of time was sometimes the result of union involvement in the process and sometimes an internal problem in obtaining individual responses in a timely manner.

18. Do you have any final comments to add regarding library support staff classification studies?

- The best case scenario has a library working closely with its institutional human resources office in designing, reviewing, and valuing a job study.
- External consultants do not necessarily have the knowledge or expertise in the nature of library work to emphasize its value. Also, if an outside consulting firm is used, choose one that is knowledgeable about university compensation issues and job duties within a university system.
- Keep existing position descriptions as up to date as possible. Position responsibilities keep changing, as does the technology used in how we perform those duties.
- Communicate with your staff what you are doing and keep them involved.
- Traditional position evaluation programs may not work well anymore. We need to find new and creative ways to pay and reward staff for their total contributions to the organization. How do we compensate the need for continual learning and growing in the workplace?
- Perhaps it is time to break out of traditional classification schemes and move to a more broadband or flexible approach to library work.
- Desk audits, while cumbersome, are valuable efforts in the long run because they provide benchmarks.

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Appendix A

List of Classification Titles

The following titles are listed in order of occurrence. For simplicity, roman numerals are not used, nor are titles that appeared not to be library specific.

Title	Responses
Library Assistant 3	23
Library Assistant 2	21
Library Assistant 1	20
Library Assistant 4	18
Library Assistant 5	11
Library Assistant	9
Library Technician 1	7
Library Technician 2	6
Library Technician 3	6
Library Specialist	6
Library Clerk	5
Library Technician	5
Library Clerk 3	4
Library Technical Assistant	4
Senior Library Specialist	3
Clerical Assistant 1	2
Clerical Assistant 2	2
Clerical Assistant 3	2
Library Assistant Senior	2
Library Assistant 6	2
Library Clerk 1	2
Library Clerk 2	2
Library Specialist 2	2
Library Supervisor	2
Library Supervisor 1	2
Library Supervisor 2	2
Library Technical Assistant 1	2
Library Technical Assistant 2	2
Library Technical Intern	2
Senior Library Clerk	2
Bands 1–17	1
Bibliographic Assistant 4	1
Bibliographic Assistant 5	1

(cont'd)

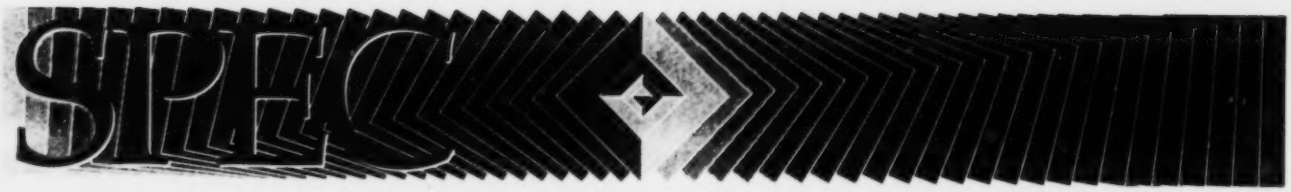
Bibliographic Assistant 6	1
Bibliographic Assistant 7	1
Bibliographic Searcher	1
Bindery Worker 1	1
Clerk	1
Clerk 2	1
Clerk 4	1
Commis à la documentation et aux equipments	1
Departmental Assistant 1	1
Departmental Assistant 2	1
Electronic Reference Assistant	1
Instructional Support Assistant	1
Instructional Support Associate	1
Instructional Support Specialist	1
Instructional Support Technician	1
Lead Library Technician	1
Level 1	1
Level 2	1
Library 3	1
Library 4	1
Library Analyst/Library Coordinator	1
Library Assistant 3 Supervisor	1
Library Assistant 4 Supervisor	1
Library Assistant/Library Supervisor	1
Library Associate	1
Library Associate 2	1
Library Associate Specialist	1
Library Attendant	1
Library Clerk 4	1
Library Clerk 5	1
Library Clerk/Senior	1
Library Clerk/Secretary	1
Library Clerk/Trainer	1
Library Departmental Supervisor	1
Library Generalist	1
Library Information Specialist 1	1
Library Information Specialist 2	1
Library Information Specialist 3	1
Library Manager 1	1
Library Manager 2	1
Library Search Technician	1
Library Specialist 1	1
Library Specialist 1—Supervisor	1
Library Specialist 2—Supervisor	1
Library Specialist 3	1

(cont'd)

Library Specialist Senior	1
Library Supervisor 3	1
Library Supervisor 4	1
Library Supervisory	1
Library Supervisory Senior	1
Library Technician 5	1
Library Technician 6	1
Library Technician 7	1
Library Technician Lead	1
Library Technician (OA)	1
Library Technician Senior	1
Member of University Staff (MUS) 1–5	1
Senior Library Assistant	1
Senior Library Associate Specialist	1
Staff Assistant 2	1
Staff Assistant 3	1
Staff Assistant 4	1
Staff Assistant 5	1
Staff Assistant 6	1
Supervisory Library Technician	1
Technical Assistant	1
Technical Assistant 1	1
Technical Assistant 2	1
Technical Assistant 3	1
Technical Assistant 4	1
Technical Assistant 5	1
Technicien en documentation	1
University Library Assistant 1–4	1
User Services Training Coordinator	1

Responding Institutions

University of Alabama
Arizona State University
University of British Columbia
Brown University
University of California–Davis
University of California–Irvine
University of California–Riverside
Case Western Reserve University
Center for Research Libraries
University of Colorado
Colorado State University
Columbia University
University of Connecticut
Cornell University
University of Delaware
Georgetown University
University of Georgia
Georgia Institute of Technology
University of Guelph
Harvard University
University of Hawaii
University of Iowa
Iowa State University
University of Kentucky
Laval University
Library of Congress
McGill University
McMaster University
University of Maryland
University of Massachusetts
Massachusetts Institute of Technology
University of Miami
Michigan State University
University of Minnesota
National Library of Medicine
University of Nebraska–Lincoln
University of New Mexico
University of North Carolina
Northwestern University
University of Oklahoma
University of Oregon
University of Pennsylvania
Pennsylvania State University
University of Pittsburgh
Purdue University
University of Saskatchewan
State University of New York at Stony Brook
Syracuse University
University of Tennessee
Texas Tech University
University of Utah
University of Virginia
Virginia Tech
University of Washington
Washington University–St. Louis
University of Waterloo
Wayne State University
University of Western Ontario
York University



Representative Documents

THE UNIVERSITY OF ALABAMA
POSITION INFORMATION QUESTIONNAIRE

PURPOSE

The purpose of this questionnaire is to gather information about the job and its requirements. This information will be used to ensure that the job is properly classified and valued in the University of Alabama Classification and Compensation Program.

Please take the time to complete this questionnaire as completely and accurately as possible. Before you begin to complete the questionnaire, please take a minute to review the following instructions.

INSTRUCTIONS

The questionnaire is divided into 15 sections. Employees should complete all sections, except for the last two sections, which are set aside for supervisors and managers. Before answering any questions, read **all** of the instructions carefully.

1. Look over the entire questionnaire to make sure you understand the questions. The questions are largely self-explanatory; however, if you have difficulties, please refer questions to your immediate supervisor.

2. The questionnaire asks you to describe the job in your own words and to provide responses which accurately represent the way the job currently functions; don't **understate or overstate** your answers. To help you in this, **keep these points in mind**:

   - Consider the job's usual responsibilities. Do not dwell on limited, short-term tasks or future responsibilities.

   - Look at the "whole picture". Compare the job to others in your department.

   - Remember, you are considering **the job** and **its requirements** -- **not your own personal background** or how you would like to see the job performed.

3. Answer all of the questions. Leave nothing blank. Please type or print neatly your responses using **black ink**.

4. A sample statement of job duties and responsibilities follows these instructions to provide you with an example of how duty statements are written.

5. After you have completed the questionnaire, sign and date it, and then give it to your supervisor for his/her review. Your supervisor and his/her supervisor will be reviewing each questionnaire separately and in relation to the questionnaires completed for other jobs they supervise. Your supervisor may wish to meet with you to discuss any differences in viewpoint.

6. Supervisors or managers should **not change or erase the employee's responses**; however, **comments may be provided in the margins next to the employee's responses and initialed** in colored pen or pencil. (Supervisors should use **red ink**; managers at the next level should use **blue ink**.)

7. Supervisors are strongly **encouraged** to meet with the employee after reviewing the questionnaire to mutually **discuss** the position and any **differences** of opinion which may exist.

SAMPLE DUTIES FOR ILLUSTRATING COMPLETION OF SECTIONS II and III

METEOROLOGIST

Position Summary: Analyzes and interprets meteorological data gathered by surface and upper air stations, satellites, and radar to prepare reports and forecasts for public and other users.

(E)ssential/ (M)arginal	% of Time	Duties and Responsibilities
E	20%	Studies and interprets synoptic reports, maps, photographs, and prognostic charts to predict long and short range weather conditions.
E	15%	Directs forecasting services at weather station, or at radio or television broadcasting facility.
E	15%	Operates computer graphic equipment to produce weather reports and maps for analysis, distribution to users, or for use in televised weather broadcast.
E	15%	Issues hurricane and other severe weather warnings.
E	10%	Broadcasts weather forecast over television or radio.
E	10%	Prepares special forecasts and briefings for particular audiences such as those invòlved in air and sea transportation, agriculture, fire prevention, air pollution control, and school groups.
E	10%	Establishes and staffs weather observation stations.
M	5%	Conducts basic or applied research in meteorology.
	100%	

Human Resources Use Only

_____

The University of Alabama

POSITION INFORMATION QUESTIONNAIRE

Affix computer label here

Please refer to instructions before completing questionnaire. Be sure to print neatly or type your responses using black ink.

I. GENERAL INFORMATION

Employee Name: _____ Soc.Sec. No.: _____

Position Title: _____

Work Phone: _____ Division: _____

Department: _____ Department No.: _____

Supervisor's Name: _____

Supervisor's Title: _____

Length of Time in Current Position: _____ Years _____ Months

Work Status: (check one): _____ Full-time _____ Part-time
(check one): _____ Regular _____ Temporary

II. POSITION SUMMARY

In the space provided below, briefly explain in one or two sentences the general purpose of your position.

III. DUTIES AND RESPONSIBILITIES

List in order of importance and explain the major duties and responsibilities of your position. Indicate whether each duty or responsibility is essential or marginal by noting the appropriate letter (E or M) next to each duty statement. Essential functions are job tasks that are fundamental to accomplishing the work. Marginal functions are those tasks that are performed either very infrequently or could be performed by others without altering the underlying reason the position exists. Indicate also the average percent of time spent performing each separate job duty. **The percentages should total 100%**. An **example** of a statement of duties and responsibilities is included with this questionnaire for your reference.

E/M	% of Time	Duties and Responsibilities

(Continued on next page)

III. DUTIES AND RESPONSIBILITIES (Cont'd)

E/M	% of Time	Duties and Responsibilities

100% Total of all percentages should equal 100%.

IV. KNOWLEDGE

1. List the specific degrees, vocational or technical training, or post-high school course work **and the field of study**, if any, **required** to qualify for this position.

2. What licenses, certifications, or registrations (e.g., electrician's license), if any, are **required** to qualify for the position?

3. What other knowledge, skills, or abilities (e.g., word processing skills, mechanical aptitude) are **required** in order to carry out the duties of this position?

V. EXPERIENCE

1. Please describe the **least** amount and type of work experience required, if any, for a person **entering** this position. Please consider only the position's minimum requirements and **not** your own qualifications.

Type of Entry Experience Needed	Amount of Entry Experience Necessary

2. **After being hired or moved into** this position, how much on-the-job training and experience is required for a new employee to learn all major duties and be able to do them well?

VI. COMPLEXITY AND CREATIVITY

This question addresses the degree of problem solving required, the types of problems encountered and how these problems are solved. It also addresses the degree of original thinking required to perform a job that is creative or artistic in nature.

In your response, please **give one or two examples** of the more difficult and complex tasks/projects/problems which you have handled in the past twelve months. Consider the amount of judgment and thought required and the availability of policies, procedures and standards to guide you in solving problems. Also consider the degree to which creative thinking is required to organize or develop new or improved methods, ideas, procedures or techniques.

VII. IMPACT ON INSTITUTIONAL MISSION

1. Describe the positive impact this position has on the operations in your area of involvement and/or on the University when it is being performed well.

VII. IMPACT ON INSTITUTIONAL MISSION (Cont'd)

2. Describe the types of negative consequences for your work area or for the University that might result from an error made by someone in this position who did not possess good job knowledge or use sound judgment.

3. Describe the type of guidance and review given to this position by the supervisor and how often (e.g., daily, weekly, monthly) that guidance and review occurs -- for example, supervisor checks work daily, supervisor spot-checks work only occasionally (monthly), supervisor sets goals for the employee and reviews progress quarterly, etc.

Type of Guidance and Review	How Often

4. Describe the departmental policies and procedures, or formalized regulations which guide the actions in this position (e.g., policies or procedures for handling an overdue account or dealing with a student's complaint).

VIII. INTERNAL AND EXTERNAL CONTACTS

These questions address the responsibility for working with or through other people inside and outside the University to get results. Consideration should be given to the nature of contact and level of interactions encountered on a regular, recurring and essential basis during operations.

1. **With whom** do you regularly communicate **inside** the University in order to perform your duties (e.g., clerical workers, department heads, etc.)? **What** do you normally communicate **about** with these individuals? **How often** do you communicate (daily, weekly, monthly, quarterly, etc.)? Please list only those contacts outside your immediate work area.

Who	Communicate About What	How Often

2. **With whom** do you typically communicate **outside** the University, if anyone, (e.g., the public, vendors or suppliers, government officials, etc.)? **What** do you normally communicate **about**? **How often** do you communicate (daily, weekly, monthly, quarterly, etc.)?

Who	Communicate About What	How Often

IX. DIRECTION EXERCISED

1. Is this position formally responsible in any way for the supervision of other University staff employees, student workers, temporaries and/or volunteers?

   Yes ____ No ____ (If no, please skip to page 9)

2. How many student workers, if any, are regularly supervised? ____

3. How many staff employees, if any, are supervised:

   Directly: ____
   (Immediate subordinates, i.e., employees that report directly to you)

   Total: ____
   (All subordinates, i.e., the total number of employees under your line of authority)

4. Briefly describe the nature and extent of your responsibility for supervising other employees. Indicate the scope of your authority for training employees, coordinating work activities, hiring, conducting performance reviews, handling disciplinary actions, etc.

5. List the title(s) of staff employee(s) that this position **directly** supervises:

Job Title	# of Employees

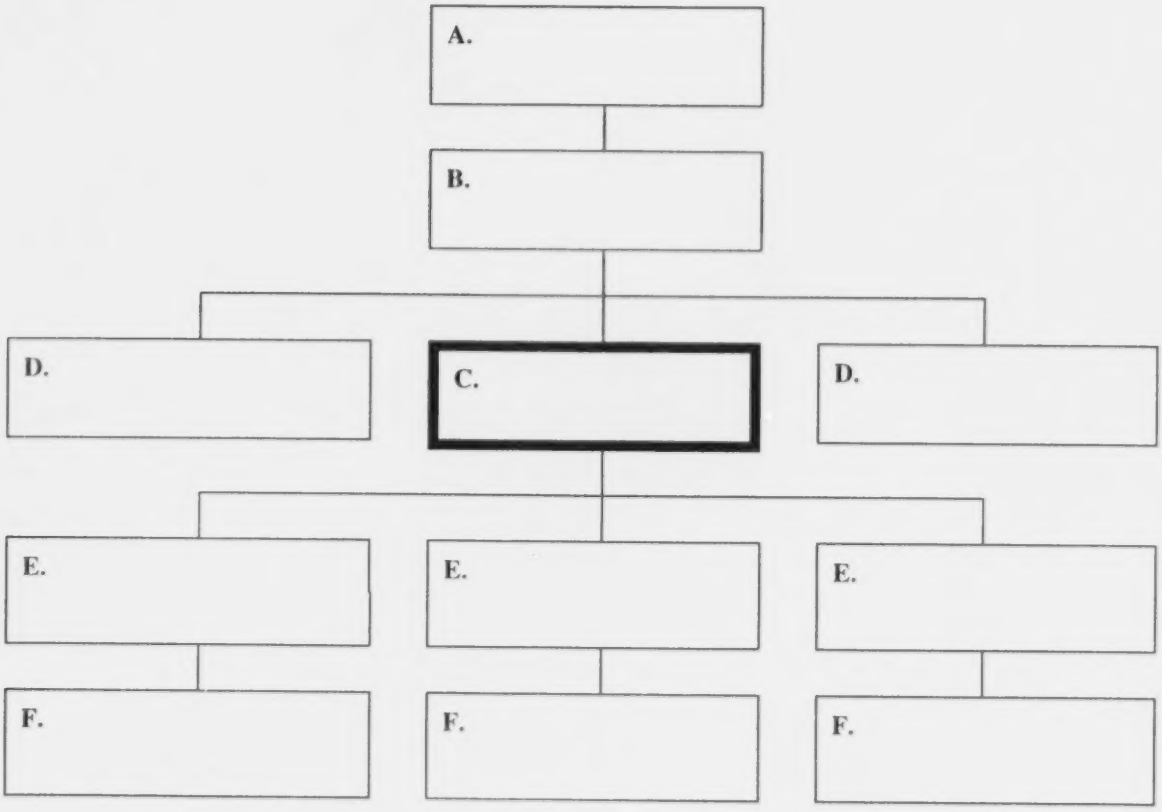
X. ORGANIZATIONAL REPORTING

In the organizational diagram depicted below, please indicate the reporting lines by completing the boxes with the appropriate title(s). The boxes are labeled according to the following key:

A. Job title of person to whom your Supervisor reports
B. Your Supervisor's job title
C. Your job title
D. Other job titles within your department that report to your supervisor
E. Job titles which directly report to you (if applicable)
F. Job titles which indirectly report to you through other individuals you directly supervise (if applicable)

If there are more positions that need to be listed than can be provided by boxes "D", "E" and "F", please indicate those titles (attach additional page(s) if necessary).

[Note: If an organizational chart of your area or department is available, the following diagram need not be completed. Simply attach the organizational chart of your area to this page and identify your position by highlighting or circling it.]



XI. PHYSICAL DEMANDS

This question addresses the physical demands of the position as measured by the amount of physical effort required to perform the work as determined by stress placed on the skeletal, muscular and/or cardiovascular systems. In your response, describe any unusual physical effort in the job, such as standing, lifting, carrying, bending, walking, etc., and list how often (daily, weekly, etc.) it occurs.

Physical Effort	How Often

XII. WORKING CONDITIONS

This question considers the quality of working conditions as measured by lighting adequacy, temperature extremes and variations, noise pollution, exposure to fumes, chemicals, radiation, contagious diseases, heights and/or other related hazardous conditions. In your response, describe the working conditions of this position, including any unpleasant features like heat, cold, high levels of noise, prolonged or near-continuous use of a video display terminal, exposure to chemical substances, contagious diseases, etc.

XIII. EMPLOYEE GENERAL COMMENTS

Because no single questionnaire can cover every part of your position, can you think of any other information which would be important in understanding your position? If so, please give us your comments below.

_____ _____

Employee Signature Date

XIV. SUPERVISOR COMMENT SECTION

This portion of the questionnaire is to be completed by the employee's immediate supervisor. As a supervisor, it is important that you review this questionnaire and note and initial any comments you may have next to the employee's responses, preferably in **red** ink. The space provided below is for general remarks you may have. Please do **not** change or erase the employee's responses.

_____ _____

Immediate Supervisor's Signature Date

XV. MANAGEMENT COMMENT SECTION

This portion of the questionnaire is reserved for comments by a second level of management above the immediate supervisor who indirectly supervises this position. As a higher level of management over this position, it is important that you review this questionnaire and note and initial any comments you may have next to the employee's responses, preferably in **blue** ink. The space provided below is for general remarks you may have.

_____ _____

Second Level Supervisor's Signature Date

CUPE/UBC JESP

Job Evaluation System Project

Introduction to the Manual

The purpose of job evaluation is to establish a relative ranking of jobs within an organization. It utilizes a systematic and detailed process of analysis and valuing of the job content.

Systematic job analysis and evaluation is based on two premises:

- Certain identifiable elements or factors are present in all jobs but in varying degrees.
- These identifiable elements or factors can be measured or evaluated.

The thirteen factors in this system are:

1. *Knowledge*
2. *Learning Experience*
3. *Judgement*
4. *Consequence of Error*
5. *Financial Responsibility*
6. *Responsibility for Goods, Tools, Equipment and Software*
7. *Supervision of Others*
8. *Contacts*
9. *Working Environment*
10. *Hazards*
11. *Dexterity*
12. *Physical Effort*
13. *Mental Effort*

This manual defines each factor and the degrees within each.

Factor definitions and notes to raters are provided to assist CUPE/UBC Joint Job Evaluation System Project (JESP) committee members, or raters, in understanding the factors. It is extremely important to the rating process that the Factor Definitions and Notes to Raters are clearly understood and interpreted in a consistent manner. Objectivity, rather than subjectivity, is critically important.

It is fundamental to the task of job evaluation that the employee, his/her supervisor and the Job Evaluation Systems Project (JESP) committee be aware that it is not an individual employee's performance that is evaluated. Job content information should be found within the job questionnaire, job description, interviews and/or work site visits.

In summary, job evaluation measures the job as it currently exists. It is a "snapshot" of how it is. It does not evaluate the individual who performs a job, nor does it measure a job as it is likely to change in the future. Changes in job content and organizational changes that impact on job content are periodically reviewed to determine the "evaluated worth" of the job. These changes are reviewed under the maintenance procedure at the time that they actually change.

Knowledge

Factor 1

This factor measures the general knowledge and specialized or vocational training necessary to **comprehensively understand the work elements**[1] involved to perform the job duties in a satisfactory manner.

The degree levels are expressed in terms of formal education or equivalent. This does not mean that a designated amount of formal education is an absolute necessity.

Knowledge is usually gained as the result of time spent in schools, vocational centres, community colleges, universities or other formal instruction programs. However, similar levels of achievement can be obtained through related experience, courses or self-improvement.

Degree	Definition
1	Elementary school or equivalent training
2	Partial high school or equivalent training
3	Full high school or equivalent training
4	One year post secondary or equivalent training
5	Two years post secondary or equivalent training
6	Three years post secondary or equivalent training
7	Four years post secondary or equivalent training
8	Five or more years post secondary or equivalent training

[1] **comprehensively understand the work elements** refers to such things as coordination capability and supervisory skills, or the accumulation of knowledge of work methods and "tricks of the trade."

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NOTES TO RATERS

Knowledge — *Factor 1*

1. Rate this factor prior to, but in conjunction with, the *Learning Experience* factor. Failure to do so could result in double counting. (e.g., jobs requiring apprenticeship or journeyperson status.
2. Use today's educational levels and standards by selecting the degree level that most appropriately meets the job requirements as set out in the Job Evaluation Questionnaire. The educational level selected on the questionnaire by the current incumbent should not be the only factor in determining the educational level on the questionnaire.
3. Choose the minimum degree level necessary to perform the work.
4. "Reading" must be given credit at the same degree as "writing" or higher.
5. **To qualify for credit in Degrees 1, 2, or 3,** two out of three "reading," "writing" and "mathematical" skills, as listed below, must be met:

   Degree 1 Completion of elementary school
   - Read simple drawings and sketches.
   - Prepare written reports such as work reports and inventory control reports.

   Degree 2 Completion of partial high school
   - Comprehend simple charts and drawings.
   - Complete basic forms, write short notes.
   - Use and understand percentages, decimals, fractions and averages.

   Degree 3 Completion of high school
   - Comprehend standard materials such as letters, memos, forms and specifications.
   - Write standard letters and memos.
   - Use and understand pre-established mathematical formulas, equations and complicated charts.

6. **Credit Part Years of Education:**
   Additional training/courses required to perform the duties of the job should be considered. Round to the nearest year (e.g., rate grade 12 plus four months as grade 12; grade 12 plus seven months as one year).
7. **Proficiency in another language:**
   Credit one year for each language if required as a major part of the job.
8. **Do not consider** the hiring practice of the organization.

Learning Experience

Factor 2

This factor measures the characteristic amount of time it takes an average individual (who has already completed the appropriate theoretical knowledge, specific education and specialized training under the knowledge factor) to obtain the practical work experience required to perform the job duties adequately.

The minimum learning experience[1] is normally less than the amount of learning experience possessed by incumbents, since it refers to the "learning curve" function of learning experience and not total personal experience.

Degree	*Assess compressed time by dividing the reasonable amount of elapsed or real time by 3.* Compressed Time	Elapsed / Real Time
1	Up to 6 months	Up to 1½ years
2	Over 6 months and under 1 year	Over 1½ years and under 3 years
3	Over 1 year and under 1½ years	Over 3 years and under 4½ years
4	Over 1½ years and under 2 years	Over 4½ years and under 6 years
5	Over 2 years	Over 6 years

[1] **minimum learning experience** refers to time spent on related work or lesser positions and the breaking-in time or training period on the job itself learning the techniques, methods, practices, procedures, use of forms, and routines, etc., needed to become competent.

NOTES TO RATERS

Learning Experience

1. Rate this factor in conjunction with the evaluation given under the *Knowledge* factor. Failure to do so could result in double counting.
2. **Consider the following:**
   a) **Prior work experience** - the minimum amount of practical learning experience on any related work or work in a lesser position required to perform the job adequately.
   b) **On the job** - breaking-in time or training period.
   c) **True life skills** and other skills gained through home-making, child rearing, volunteer work, etc.
   d) **Supervisory experience** - rate each job on the basis of degree and complexity of supervision, organizational and delegation skills, and the requirement to direct staff, evaluate, observe, monitor, etc.
   e) **Field time** required for membership in a professional organization, designation, or requirements for a licence.
   f) **Driving licence** - Credit 1 year for basic Class V.
   g) **Credit for Computer Software Experience**
      10 weeks for each program - beginner level
      20 weeks for each program - intermediate level
      30 weeks for each program - advanced level
3. **Do not consider the following under this factor:**
   - The hiring practice of the organization.
   - The actual experience of the incumbent.
   - Maturity of the individual.

Judgement

Factor 3

This factor measures the requirement of the position to exercise judgement in making decisions and carrying assignments within the parameters and constraints of the position. (i.e., the choice of action which is within the scope of the job duties)

Degree	Definition	Nature of Situations Typically Encountered
1	• Tasks are clearly defined. • Little or no latitude exists for exercising judgement • Most problems are referred to supervisor. • Little planning required. Tasks arranged by others.	Repetitive and identical in nature.
2	• Assignments are covered by well defined methods and procedures. • Some latitude exists for organizing work or exercising judgement within established guidelines. • Most unusual problems are referred to the supervisor.	Similar in nature with choice among limited alternatives. (i.e., there is a definite pattern to situations encountered. Required data and information is available or obtainable.)
3	• Assignments are covered by broadly established methods and procedures or standards of accepted practices. However, some judgement is required in adapting these guidelines to get the desired end result. • The exercise of judgement is a normal requirement but is restrained by program objectives. • Direction is sought when apparent solutions to problems are not within the intent of established practices.	Differing in nature, requiring search for solutions among several alternatives. (i.e., there may be certain intangibles, uncertainty or missing information to assess and consider.)
4	• Assignments frequently involve modifying established methods or procedures, recognizing and analyzing problems/situations and using trouble shooting techniques to reach solutions or devising new courses of action within the intent of existing programs, legislation or professional standards. • The exercise of judgement is extensive and is complicated by the need to consult and coordinate action plans. • Supervisors are available in relation to administrative matters, and may be consulted on professional/clinical/technical matters, but solutions are not normally expected during such discussions.	Variable in nature, requiring analytical, interpretative and evaluative thinking. (i.e., there are significant intangibles and uncertainties to consider.)
5	• Assignments involve development of solutions to diverse and interrelated problems, often having conflicting requirements, affecting an individual or affecting specific policies or programs. • The exercise of judgement is extensive and involves complex issues. • Consultation will usually take place in a peer group or interdisciplinary team review.	

NOTES TO RATERS

Judgement — *Factor 3*

1. **When evaluating, consider the following:**

   - The limiting effects of a supervisor's instructions and work checks.
   - The requirement to work to detailed and established procedures, standards, practices and precedents.
   - Latitude allowed for decision-making on an on-going basis.
   - The types of situations or problems requiring judgement.
   - The majority of the items of the selected degree must be met. (i.e., if a position meets one of the three items in *Degree 2* and two of the three items in *Degree 3*, the position is properly rated in *Degree 3*.)

2. **Do not consider:**

   - "Confidentiality", as it is expected of all employees.
   - Decisions made while temporarily covering for another employee or a more senior position.
   - Capability of the incumbent.

3. Even the simplest jobs require decision making on occasion. Some work may be so routine or standarized that the decision making is done automatically or almost so.

Consequence of Error

Factor 4

This factor is used to measure the consequence of making errors in judgement.

Consider the consequences on UBC of making judgemental errors in the decision making process.

Degree	*Incorrect or inappropriate recommendations, decisions, or actions could have the following consequences on UBC.*
1	• Little effect on financial costs and/or • Little effect on service to the public.
2	• Obvious consequences on financial costs • Adverse client, patient, or public relations • Reduced service to the public • Requires intervention to deal with repercussions.
3	• Serious, usually short term consequences • Significant financial costs • Reduced or impaired service to the public • Negative media reaction • Requires intervention by head of the department to deal with repercussions.
4	• Major, frequently long-term consequences • Very substantial financial costs • Negative media reaction • Requires President's Office and/or political debate to deal with the repercussions.

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NOTES TO RATERS

Consequence of Error — *Factor 4*

Consider the following:

1. The impact of the consequence of errors on UBC.
2. The length of time an error will have an impact.
3. The limiting effects of consequences by the frequency of work checks and how well defined the job is. (i.e., work checked daily or weekly is likely to have little influence on UBC. Work checked less frequently (e.g., monthly audit) may provide a greater possibility that an incorrect decision will have some consequences for UBC.
4. The level at which the intervention is required to correct the error.
5. The majority of the items of the selected degree must be met to qualify for that degree.
6. The importance of differentiating between the results of failure to carry out job responsibilities and the results of incorrect or inappropriate recommendations or decisions.
7. The typical effects of an error that normally occur.

Do not consider:

- Consequences that result from human error or carelessness.
- The consequences of not carrying out well established procedures.
- The remote possibility of an exceptional error having disastrous consequences.

Definitions:

- **Error** is defined as the inappropriate or incorrect option selected during the decision-making process.
- **Decision** is defined as the final determination of a course of action that is to be followed.
- **Service to the public** is any service rendered to the University community and/or others.
- **Recommendations/actions** include those made by persons who do not have final decision-making responsibility, but upon which others may base activities or decisions with minimal review.

Financial Responsibility

Factor 5

This factor is used to measure the responsibility or accountability for financial resources. The following characteristics of the work are to be considered in selecting a degree:

- the responsibility for financial processing
- the administration of a budget
- the responsibility for activities that result in making financial commitments

Degree	Definition
1	• No responsibility.
2	• Handling or processing cash, purchase requisitions, cheques, bonds, etc. • Responsibility for initiating requests or authorizing the payment of materials delivered or services rendered.
3	• Signing authority to make expenditures or recoveries according to detailed written procedures.
4	• Administering a budget or contract. • Authority to sign official University contracts.
5	• Financial forecasting and making recommendations based on those forecasts.

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Degree 2

- **Authorizing the payment** of materials delivered refers to the purchase of materials through a blanket purchase order of up to $500.00 per item.

Degree 3

Signing authority is defined as the authority to make or commit expenditures or recoveries according to the Financial Services signing authority procedures, or similar authority accorded by their department head.

Degree 4

- **Administering a budget** is deemed to include data collection for budget preparation, monitoring and tracking of expenditures during the fiscal year; and any coordinating or data reporting activities that may be required during the budget preparation or execution phases.

- **Authority to sign official UBC Contracts** is designated by the Board of Governors Signing Authority Resolutions. This specifically refers to the Purchasing Department, Bookstore and Library where specific individuals are given authority to commit the University to binding contracts.

Responsibility for Goods, Tools, Equipment and Software

This factor measures the responsibility to operate, handle, adjust, adapt or maintain goods, tools, equipment and software.

Degree	*Definition*
1	No responsibility
2	Responsible for basic care and handling of goods, tools, equipment and software.
3	Responsible for doing prescribed maintenance and/or making modifications/adjustments required to do the job.

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NOTES TO RATERS

Factor 6

Responsibility for Goods, Tools, Equipment and Software

Degree 2

Basic care and handling means:

- Knowing the sequence in which equipment is operated (e.g., driving vans, entering data, operating computers, wordprocessors, cash registers, dictaphones, etc.).

Degree 3

Maintenance means:

- Identifying when preventive maintenance is required, *and*
- Includes responsibility for some basic maintenance.

Prescribed maintenance and/or making modifications/adjustments:

- Only considered if necessary to perform the job. (e.g., programming software).

Supervision of Others

Factor 7

This factor measures the continuing responsibility the incumbent assumes for the supervision and direction of staff. Consider the following the nature of supervision given that is either direct or functional

Degree	*Definition*
1	• Work does not have the requirement to exercise supervision. • Occasionally may explain work procedures to new or inexperienced employees.
2	The job may involve: • Coordinating and scheduling the day to day work of other workers or volunteers in the unit and monitoring output, *and/or* • Providing functional supervision to others.
3	Employee acts as a supervisor or group leader of other workers or volunteers with responsibilities such as scheduling and assigning work, training staff, providing direction, checking work in progress and upon completion. This level has input into decision making for all or some personnel matters such as: • making hiring or promotion recommendations • appraising the work of others • handling disciplinary matters

NOTES TO RATERS

Supervision of Others — *Factor 7*

Do not consider occasional supervision such as that performed during the absence of the supervisor on annual vacation or sick leave.

Degree 1

Is assigned to incumbents of positions who are permitted (but not required) to:

- pass work to others
- explain or to elaborate the objectives,
- point out errors

Degree 2

Functional supervision involves giving technical or specialized instruction of a policy or procedural nature, (relating to a work project or program) to employees supervised directly by someone else. For example, to ensure the safety of the lab, a senior technician may be responsible for ensuring that all other technicians who do not report to this position follow proper laboratory procedures.

Degrees 2 & 3

To qualify for *Degree 2* or 3, supervisory responsibilities must be a regular and on-going requirement of the job.

Contacts

Factor 8

This factor measures the responsibility for effective handling of personal contacts with students, faculty, other staff, members of other organizations and with the general public. Consideration should be given to the nature and purpose of such contacts.

The following characteristics of the work are to be considered in selecting a degree:

- the purpose of the contact
- the nature of the contact (i.e., the extent to which tact, persuasiveness and interpersonal skills, etc., are required)

Degree	*Nature*	*Purpose A*	*Purpose B*
		To exchange/discuss information in accordance with current policies and technical practices	To clarify/exchange and discuss information of a detailed or specialized nature requiring specialized knowledge; gain cooperation; coordinate activities or programs; mitigate high tension or emotional situations.
1	Courtesy		
2	Tact and discretion		
3	Communication, empathy and/or sensitivity skills		
4	Interpersonal and communications skills		

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NOTES TO RATERS

Contacts — *Factor 8*

1. Contacts between supervisor and subordinate **are not** considered under this factor - they are considered under the *Supervision of Others* factor.

2. It is important to analyze the purpose of the contact in conjunction with the nature of the contact. The level of the person contacted is relevant to the extent that it serves as a check on the nature and purpose of the contact. (i.e., a file clerk might provide information to a supervisor but it is extremely unlikely that this file clerk would be required to explain or follow-up on matters calling for communication or interpersonal skills.)

3. When determining whether the skill of courtesy or tact/discretion is required, it is important to analyze the nature of the contact.

   Select courtesy *(Degree 1)*

   - if the reason for the contact is not required to explain action
   - if sensitive or emotional issues are referred to a higher level

   Select tact and discretion *(Degree 2)*

   - if a contact is of a sensitive or delicate nature

4. *Degree 4* To qualify for Degree 4, interpersonal and communication skills must be a major requirement of the job.

Definitions:

Courtesy:
- polite, respectful, cooperative or obliging behaviour

Tact:
- a keen sense of what to do or say in a difficult or delicate situation in order to maintain good relations with others or avoid offense
- implies both skill and consideration in dealings with others and a sympathetic understanding in observing the feeling of others.
- skill involved in handling a new or difficult situation

Discretion:
- cautious reserve, especially in speech
- ability to make decisions which represent a responsible choice and for which an understanding of what is lawful, right or wise is presupposed.

Communication skills:
- includes skills such as oral/visual presentation skills, writing skills, listening and observation skills, etc. Writing skills involve writing reports and/or correspondence that require precise use of language, and careful articulation of opinions, ideas and issues.

Interpersonal skills:
- includes skills such as empathy, sensitivity, understanding of human and organizational behaviour, and motivational techniques, etc.

Contacts of a detailed or specialized nature
- those dealing with a subject area that is complex and typically requires specialized, formal training or extensive experience to enable the participants to communicate in a meaningful fashion.

This factor measures the frequency of exposure to undersirable or disagreeable environmental conditions under which the work is performed.

Refer carefully to the *Notes To Raters* for the characteristics of the work to be considered before selecting a degree.

Degree	*Exposure to Disagreeable Working Conditions*
1	Almost no exposure to disagreeable conditions.
2	Occasional exposure to minor disagreeable conditions.
3	Frequent exposure to minor *or* Occasional exposure to major disagreeable conditions.
4	Almost continuous exposure to minor *or* Frequent exposure to major disagreeable conditions.
5	Almost continuous exposure to major disagreeable conditions.

NOTES TO RATERS

Working Environment — *Factor 9*

1. **Rate the working conditions** in the following order:
   i) Determine whether the conditions are major or minor
   ii) Determine the frequency of these conditions

2. **Consider the following:**
   - Only those conditions which are inherent in the nature of the work and occur over a cycle of a year or more.
   - Interruptions, multiple deadlines and demands which result in the disruption to work and to the quality and quantity of output.

3. **Do not consider:**
   - Extreme situations where the risk of a specific situation occurring is unlikely.
   - Conditions which are recognized through Collective Bargaining and for which premiums are paid.

4. **Typical minor disagreeable conditions** include:
   - slight conditions of

chemical substance	*dust*	*interruptions*
lack of work space	*noises*	*odour*
travel	*Verbal Abuse*	

   - exposure to difficult clients
   - travel (consider frequency and duration)

5. **Typical major disagreeable conditions** include:
   - extreme conditions of

chemical substance		*dust*	*noise*
odour	*verbal abuse*		

   - confined or isolated working conditions

6. **Relate the frequency of exposure** to undesirable working conditions to work on a continuing basis throughout the year.

Occasionally	· once in a while, over a period of time
Frequently	· often, over a period of time, such as several times daily almost every day.
Continuously	· almost all day, except for coffee and meal breaks, at least 80% of the work week.

Hazards

Factor 10

This factor is used to measure the frequency of exposure to hazards or safety requirements under which the work is performed. Refer carefully to the *Notes to Raters* for the characteristics of the work to be considered before selecting a degree. In general, consider the following characteristics of work:

- exposure to hazards which present a risk to health or personal safety
- requirement to use safety devices, clothing or other safety procedures.

Degree	Exposure to Hazards
1	Almost no exposure to hazards or safety requirements.
2	Occasional exposure to minor hazards or safety requirements.
3	Frequent exposure to minor ***or*** Occasional exposure to major hazards or safety requirements.
4	Almost continuous exposure to minor ***or*** Frequent exposure to major hazards or safety requirements.
5	Almost continuous exposure to major hazards or safety requirements.

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NOTES TO RATERS

Hazards — Factor 10

1. Hazards can be major or minor. Whether the hazard is major or minor depends on the degree and the severity of the resulting injury. **Rate hazards** in the following order:
   i) Determine whether the hazards are major or minor
   ii) Determine the frequency of exposure to these hazards

2. **Consider** only those hazards which are inherent in the nature of the work.

3. **Do not consider:**
   - Extreme situations where the risk of a specific accident or situation occurring is unlikely
   - Hazards which are recognized through Collective Bargaining and for which premiums are paid

4. ***Minor hazards*** *can include*:
   May cause or result in:
   - long periods of repetitive motion
   - mild sprains, bruises, cuts, repetitive strain injury, etc.
   - slight discomfort for a short period of time
   - little possibility of lost time and/or little inconvenience to work patterns
   - at most, a simple protective dressing.

5. Major haxards can includeL
   - long periods of repetitive motion
   - exposure to violence.

   May cause or result in:
   - severe cuts, burns, bruises, back injury, repetitive strain injury etc.
   - injury which extends beyond the day of occurrence
   - lost time and/or change in work patterns
   - the need for medical attention

6. **Repetitive Strain Injury (RSI)** can be caused by long periods of repetitive motions, often accompanied by forceful exertions and any of the following:
   - awkward body postures
   - inadequate ergonomic designs
   - faulty work patterns, e.g., insufficient rest periods, lack of task variation, etc.

   Examples of activities that may result in RSI if performed in a repetitive fashion include:
   keyboarding

Frequent short	*or*	occasional intermediate	*Degree 2*
Frequent intermediate	*or*	continuous short	*Degree 3*
Frequent long	*or*	continuous intermedite	*Degree 4*

7. **Relate the frequency of exposure** to hazards and safety requirements to work on a continuing basis throughout the year. **Occasionally** once in a while, over a period of time
   Frequently often, over a period of time, such as several times daily, almost every day
   Continuously almost all day, except for coffee and meal breaks, at least 80% of the work week.

Dexterity

Factor 11

This factor measures the level of dexterity required by a job. The levels of manual dexterity are determined by considering the elements of hand/eye or hand/foot coordination. Movements can be either coarse, medium or fine.

Degree	Coordination of Movements Required by Employee
1	Tasks do not demand coarse, medium or fine movements.
2	Tasks demand coordination of coarse movements.
3	Tasks demand coordination of medium movements.
4	Tasks demand coordination of fine movements.

NOTES TO RATERS

Dexterity — Factor 11

This subfactor considers only the coordination element of the movements, not the duration.

Degree 2

1. **Coarse movements** are heavy handed or rough motor movements such as:
   - stocking shelves, bundling papers, dusting, driving.

Degree 3

2. **Medium movements** are precise or accurate movements such as:
   - keyboarding

Degree 4

3. **Fine movements** are delicate or intricate movements such as:
   - electronic circuit board repair

Physical Effort

Factor 12

This factor refers to the physical fatigue that results from performing the duties of the job. Consider the following characteristics of the work in selecting a degree:

- frequency of performing tasks that cause fatigue
- requirements to assume an uncomfortable or awkward posture
- requirements to lift, push or pull objects

Degree	The Work Involves:
1	Occasional light physical activity.
2	Frequent light physical activity *or* occasional moderate physical activity.
3	Almost continuous light physical activity *or* frequent moderate physical activity *or* occasional heavy physical activity.
4	Almost continuous moderate physical activity *or* frequent heavy physical activity.
5	Almost continuous heavy physical activity.

NOTES TO RATERS

Physical Effort — *Factor 12*

In applying this sub factor, consider the fatiguing effort of the tasks performed rather than the strength or energy needed to perform the task. Always assume that the incumbent is of adequate physique for the type of work involved, regardless of sex.

1. Determine the following **separately and in order**:

   i) **Whether activities are light, moderate or heavy:**

Light	lifting, pushing, pulling light weights ***(1-20 lbs or up to 9 kg)***
Moderate	working in awkward positions or confined spaces (e.g., working on a computer, typewriter or word processor), climbing ladders, lifting, pushing or pulling medium weights ***(20-35 lbs or 9-16 kg)***
Heavy	lifting, pushing or pulling heavy weights ***(over 35 lbs or 16 kg)***

   ii) **The frequency:**

Occasionally	once in a while, over a period of time
Frequently	often, over a period of time, such as several times daily almost every day
Continuously	almost all day, except for coffee and meal breaks, at least 80% of work week.

2. | | | |
   |---|---|---|
   | *Degree 1* | **Occasional light** | |
   | | Sitting with freedom to move around at will | |
   | *Degree 2* | **Frequent light** | |
   | | Sitting without freedom to move around at will | *50-80% of day* |
   | | Walking | *50-80% of day* |
   | | Standing | *up to 50% of day* |
   | *Degree 3* | **Continuous light** | |
   | | Sitting without freedom to move around at will | *over 80% of day* |
   | | Walking | *over 80% of day* |
   | | **Frequent moderate** | |
   | | Standing | *50-80% of day* |
   | *Degree 4* | **Frequent heavy** | |
   | | Standing | *over 80% of day* |

3. **Keyboarding**, as a moderate activity, falls into Degrees 2, 3 or 4, depending on the frequency.

This factor refers to the mental, visual and/or auditory fatigue that results from performing the duties of the job. The frequency and duration of mental/sensory concentration is what determines the fatigue. The following characteristics of the work are to be considered in selecting a degree:

- frequency of performing tasks that cause mental/sensory fatigue
- length of time spent on tasks that cause mental/sensory fatigue.

Degree	*Periods of Sensory Concentration Required*
1	• Occasional short periods
2	• Frequent short periods *or* • Occasional intermediate periods
3	• Almost continuous short periods *or* • Frequent intermediate *or* • Occasional lengthy periods
4	• Almost continuous intermediate periods *or* • frequent lengthy periods
5	• Almost continuous lengthy periods

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NOTES TO RATERS

Mental Effort — Factor 13

1. To evaluate the fatigue resulting from mental, visual or auditory (listening) concentration:
   - analyze the character of the activities
   - determine the phases of the work requiring concentrated effort, their duration and frequency

2. **Sensory concentration**[1] should be evaluated in the following order:

   i) **Duration** (measured in terms of periods of activity which should not be interrupted)
   - **short** about one hour or less
   - **intermediate** more than one hour but less than two hours
   - **long** two hours or more (mandatory rest periods are not considered interruptions)

   ii) **Frequency** (must be related to work on a continuing basis throughout the year)
   - **occasionally** once in a while, over a period of time
   - **frequently** often, over a period of time, several times daily, almost every day.
   - **continuously** almost every day, except for coffee and meal breaks, at least 80% of work week

[1] **Sensory concentration** is the focusing of the senses (eyes, ears, etc.) on various phases of work such as:
- *reading*
- *word processing*
- *driving*
- *transcribing tapes*

The University of British Columbia

M&P Job Evaluation

Manual

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SUMMARY OF M&P JOB EVALUATION FACTORS, SUBFACTORS AND WEIGHTS

FACTOR	FACTOR WEIGHT	SUBFACTOR	SUBFACTOR WEIGHT
RESPONSIBILITY	50%	Accountability	12%
		Communication & Interpersonal	12%
		Human Resources	10%
		Freedom to Act	8%
		Financial	8%
KNOWLEDGE/SKILL	40%	Design/Analytical/Research/Technical Skills	20%
		Knowledge	14%
		Organizational Knowledge	6%
EFFORT	7%	Sensory Demands	4%
		Physical Demands	3%
WORKING CONDITIONS	3%	Working Conditions	3%
	100%		100%

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KNOWLEDGE

Notes to Raters

1. Use today's educational standards. Consider the minimum level of knowledge necessary to perform the job.

2. "Discipline" refers to a defined body of knowledge which may be theoretical and/or applied, e.g., mathematics, chemical engineering, accounting, counselling psychology.

3. A formalized vocational certificate or diploma requires up to one year's post secondary course work in the field of study.

4. An undergraduate university degree requires four or five years of undergraduate studies.

5. An undergraduate university degree is required for those computer and data processing jobs that require knowledge of statistical techniques/modelling for conceptual system design.

6. P. Eng., C.A., C.G.A. and C.M.A. are credited at the Master's level if a requirement of the job is to sign-off audits or plans, or verify work by certified professionals.

7. A master's degree or other advanced university degree typically requires at least five years university education (e.g. undergraduate plus specialized graduate studies).

8. A Master's degree or equivalent is necessary to teach senior undergraduate or graduate courses.

9. A generalist M.D. degree is considered to be Degree 5 while a specialist M.D. degree is considered to be Degree 6.

10. A Ph.D. must be completed within six years of initial registration in the Ph.D. program.

11. A Ph.D. degree or equivalent is necessary if a requirement of the job is to conduct independent and publishable research.

12. Required fluency in another language is equivalent to up to one year of formal education.

KNOWLEDGE *[Continued]*

Definition

This subfactor measures the level of training and/or knowledge necessary to fulfill the requirements of the position. Knowledge is most commonly gained as the result of time spent in schools, colleges, universities or other formal instruction programs, or obtained as a result of on-the-job and specialized training, and/or experience.

Subfactor Levels

Degree 1

Ability to use and understand charts and drawings. Use of arithmetic formulae. Use of office technology requiring training (e.g., word processing and/or basic spreadsheet capability).

Equivalent of full secondary school (Grade 12).

Degree 2

Ability to apply a general understanding of a vocation's concepts to perform entry level work assignments.

Equivalent of up to one year formalized post-secondary vocational training with certificate or diploma, for example, security training.

Degree 3

Ability to understand and apply guidelines, procedures and practices typically of an administrative or technical area.

Equivalent to a community college or technical institute diploma, such as personnel management, business management, computing, media.

Degree 4

Ability to apply knowledge of principles, guidelines and procedures and an understanding of a professional/administrative/technical discipline's concepts.

Equivalent to an undergraduate university degree, for example, B.Comm., B.A., B.Sc., B.Ap.Sc., C.G.A. or C.M.A. or C.A. or P.Eng. designation if not required to sign-off on audits.

→

KNOWLEDGE *[Continued]*

Degree 5

Ability to apply a professional/administrative discipline's concepts through advanced specialization work. May require limited knowledge of related disciplines to align activities with the goals and objectives of other areas. May require advanced knowledge of experimental and research techniques.

Equivalent to a master's degree or other advanced university degree, for example P.Eng. or C.A. or C.G.A. or C.M.A. if required to sign-off on audits, M.S.W., L.L.B., M.A., M.Sc., B.Arch., D.D.M., M.D., M.B.A.

Degree 6

Knowledge requires exceptional comprehension of a variety of related and unrelated disciplines to develop new policies or programs.

Equivalent to advanced academic studies, for example Ph.D. and/or post doctoral studies.

ORGANIZATIONAL KNOWLEDGE

Notes to Raters

1. "Familiarity" of academic (i.e., research and teaching) and/or administrative (e.g., business practices and workflow) workings means that an incumbent is required to have a basic understanding of organizational practices, but is not required to apply the knowledge in order to perform in the job.

2. A "general" understanding means that the incumbent is required to understand the organizational practices **and** how to apply them in performing the job.

3. An "in-depth" understanding means that the incumbent is required to understand the organizational practices and needs, how to apply them, and understand why they exist.

4. A "unit" is defined as being one of the following:

   - Service Department
   - Centre, Institute or School
   - Office of a Dean
   - Academic Department or Division (not considering academic divisions that are within an academic department).
   - Office of the President
   - Office of a Vice-President
   - Office of an Associate Vice-President

   See Appendix A for a list of UBC units.

5. A "work area" is defined as a group within the unit. It can consist of one or more positions working towards a common goal; either under own direction or under direction of one of the positions in the group. "Work area" may equal "unit".

6. "Governing Bodies of the University" is defined as the Board of Governors, and/or Senate and their related Committees. A job requiring knowledge of the governing bodies of the university has a regular responsibility to report to, work with, and seek approval from Board of Governors, Senate, and related Committees.

7. Do not consider knowledge of human resources and financial practices under this subfactor as these are already considered under other subfactors in the plan.

ORGANIZATIONAL KNOWLEDGE *[Continued]*

Definition

This subfactor measures the understanding of the University's governing bodies and its academic and administrative practices. This knowledge can only be acquired through U.B.C. working experience in order to perform the job in a fully functional capacity. In selecting the degree, consider both the depth and breadth of organizational knowledge, practices, and needs.

	A. Knowledge of own work area	B. Knowledge of other work areas within the unit	C. Knowledge of other units	D. Knowledge of the governing bodies of the University
1. No requirement				
2. Requires familiarity of academic/ admin. workings.				
3. Requires general understanding of academic/admin. workings.				
4. Requires in-depth understanding of academic/admin. workings.				

DESIGN, ANALYTICAL, RESEARCH AND TECHNICAL SKILLS

Notes to Raters

1. Consider the extent to which the job must analyze and define problems and/or issues, and arrive at solutions.

2. Problems and/or issues include all activities encountered as part of the job.

3. "Discipline" refers to a defined body of knowledge which may be theoretical and/or applied, e.g., mathematics, chemical engineering, accounting, counselling psychology.

DESIGN, ANALYTICAL, RESEARCH AND TECHNICAL SKILLS

[Continued]

Definition

This subfactor measures the design, analytical, research, and technical skills required for the solution of typical job-related problems and/or issues encountered in the completion of job assignments. These skills are acquired through job-related experience.

Subfactor Levels

Degree 1

Issues and/or problems encountered are simple and generally repetitive. Answers are readily identified from a few alternatives and little or no analysis is required.

Degree 2

Source of issues and/or problems are easily identified. Established practices, precedents or procedures will provide solutions to most problems/issues.

Degree 3

Issues and/or problems encountered may require choices among limited alternatives. Interpretation of established methods or past practices will provide solutions.

Degree 4

The issues and/or problems encountered have symptoms which may be vague, misleading or unrelated. Independent thinking is required in the analysis and interpretation of the problems. Solutions are found most often from several existing alternatives within the parameters of a discipline or the policies of the area.

Degree 5

The issues and/or problems are unique in their nature due mainly to changing circumstances. Understanding of the issues may require knowledge from more than one discipline. Independent thinking is required in the analysis and interpretation of the problems and in the development of the solutions.

Degree 6

Issues and/or problems have never been encountered before. Creative thinking is required to arrive at solutions, which are without existing precedent.

FREEDOM TO ACT

Notes to Raters

1. A "unit" is defined as being one of the following:

   - Service Department
   - Centre, Institute or School
   - Office of a Dean
   - Academic Department or Division (not considering academic divisions that are within an academic department).
   - Office of the President
   - Office of a Vice-President
   - Office of an Associate Vice-President

   See Appendix A for a list of UBC units.

2. A "work area" is defined as a group within the unit. It can consist of one or more positions working towards a common goal; either under own direction or under direction of one of the positions in the group. "Work area" may equal "unit".

FREEDOM TO ACT *[Continued]*

Definition

This subfactor measures the job's independence in performing the assigned responsibilities. Consideration is given to controls imposed by policy, systems or procedures, and work review by others. It reflects the typical requirements of a job, not the capabilities of the incumbent or the delegation style of the supervisor.

Subfactor levels

Degree 1

Assignments are performed by following established methods or clearly defined procedures. Work is checked at regular intervals.

Degree 2

Works toward defined objectives usually set by others (users, clients, managers). The job selects the most appropriate methods, subject to the unit's policies and practices or standards of a discipline. Work review occurs when major activities are completed.

Degree 3

The job defines its objectives based on direction usually set by others (users, clients or managers). The job selects the most appropriate methods and applies them, subject to the limitations of the unit's policies and procedures. Review is limited to results at the completion of projects or at pre-determined periods of the operational cycle.

Degree 4

The job develops, amends or implements the operational direction, practices and procedures of its own unit in light of its mandate to the University.

Degree 5

The job defines the role of its own unit in light of University policies and develops procedures and practices that may affect many other units of the University.

Degree 6

The job is responsible for developing or modifying policies or plans of the University.

ACCOUNTABILITY

Notes to Raters

1. "Service to the public" is any service rendered to the University community and/or others.

2. "Recommendations" include those made by jobs that do not have final decision-making responsibility but upon which others may base activities or decisions with minimal review.

3. "Decision" is defined as the final determination of a course of action that is to be followed.

4. Consider the typical **IMPACT** of recommendations/decisions that normally occur and not rare or extreme ones.

5. A "unit" is defined as being one of the following:

   - Service Department
   - Centre, Institute or School
   - Office of a Dean
   - Academic Department or Division (not considering academic divisions that are within an academic department).
   - Office of the President
   - Office of a Vice-President
   - Office of an Associate Vice-President

   See Appendix A for a list of UBC units.

6. A "work area" is defined as a group within the unit. It can consist of one or more positions working towards a common goal; either under own direction or under direction of one of thepositions in the group. "Work area" may equal "unit".

ACCOUNTABILITY *[Continued]*

Definition

This subfactor measures the impact of recommendations/decisions made on the university, service to the public, and/or public relations.

Subfactor Levels

Degree 1

Recommendations/decisions affect the work of the immediate work area **and/or** have an impact on the delivery of service to the public.

Degree 2

Recommendations/decisions affect the work of the position's own unit **and/or** impact the maintenance of service to the public **and/or** cause embarrassment in public relations.

Degree 3

Recommendations/decisions affect the work of another unit whose work is dependent on the position's unit **and/or** impact the nature and the level of service to the public **and/or** cause adverse public relations.

Degree 4

Recommendations/decisions affect a number of other units due to late delivery of service(s), material shortage, faulty information delaying the delivery of many services to the public **and/or** create embarrassment for the University as a whole.

Degree 5

Recommendations/decisions affect the University as a whole due to the breakdown of organization-wide programs or services **and/or** cause a major loss of the organization's prestige.

FINANCIAL RESPONSIBILITY

Notes to Raters

1. A "unit" is defined as being one of the following:

   - Service Department
   - Centre, Institute or School
   - Office of a Dean
   - Academic Department or Division (not considering academic divisions that are within an academic department).
   - Office of the President
   - Office of a Vice-President
   - Office of an Associate Vice-President

   See Appendix A for a list of UBC units.

2. Signing authority is the responsibility for signing for goods or services.

3. Responsibility for forecasting and making budget submissions is deemed to include the analysis of pertinent budget data, and making a prediction or calculation as a result of this analysis, and making recommendations for budget submissions.

4. Administration of a budget is deemed to include data collection for budget preparation, monitoring and tracking of expenditures during the fiscal year or project duration, and any coordinating of data reporting activities that may be required during the budget preparation or execution phases.

5. Accountability for a budget means the job involves making decisions that will ensure expenditures are in line with budget limits and/or recoveries are in line with revenue targets.

   The types of funds include:

   - General Purpose Operating (GPO), including equipment budget
   - Specific Purpose/Sponsored Research
   - Capital, including major or minor (e.g., building renovations, road construction)
   - Ancillary Enterprise

   Any of the above can have a "fee for service/revenue generation/cost recovery" component.

6. A budget may consist of one or more types of the funds:

   - General Purpose Operating (GPO), including equipment budget
   - Specific Purpose/Sponsored Research
   - Capital, including major or minor (e.g., building renovations, road construction)
   - Ancillary Enterprise

FINANCIAL RESPONSIBILITY *[Continued]*

Definition

This subfactor measures the financial responsibility of a position. When measuring financial responsibility the following are considered:

- Budget forecasting.
- Making recommendations for budget submissions.
- Signing authority.
- Administration of a budget.
- Accountability for a type of funding (General Purpose Operating [GPO], Specific Purpose/Sponsored Research, Capital [minor or major] or Ancillary Enterprise), considering its magnitude and the necessity for revenue generation.

FINANCIAL RESPONSIBILITY *[Continued]*

	A. Up To $1 Million	B. $1 Million to $5 Million	C. $5 Million to $10 Million	D. More Than $10 Million
1. Little or no responsibility.				
2. Signing authority.				
3. Responsible for forecasting and making proposals for budget submission.				
4. Responsible for budget administration.				
5. Accountable for one type of funding.				
6. Accountable for revenue generation/cost recovery, **OR** for two types of funding.				
7. Accountable for two types of funding including revenue generation/cost recovery, **OR** three types of funding.				
8. Accountable for three types of funding including revenue generation/cost recovery, **OR** four types of funding.				
9. Accountable for four types of funding including revenue generation/cost recovery.				

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HUMAN RESOURCES RESPONSIBILITY

Notes to Raters

1. Employees who are permitted (but not required) to pass work to others, to explain or to elaborate an objective, and to point out errors, are to be assigned to Degree 1.

2. To qualify for a Degree 3 or higher, supervisory responsibilities must be a regular and **on-going** requirement of the job. Rate jobs that only perform supervisory duties on an irregular basis (such as replacing a vacationing or sick supervisor) at Degree 1.

3. **Functional guidance** involves giving specialized/technical direction to people supervised directly and indirectly by another position. As a result of the job's expertise or responsibilities, this job gives direction to others on how to do certain things, sets policies or procedures and ensures that policies and procedures are followed.

4. **Direct supervision** includes the responsibility of the day-to-day work of staff who report **directly** to the position.

5. To qualify for Degree levels 4 or 5, a position must supervise two or more employees on a regular basis.

6. **Indirect supervision** involves the supervision of activities of other employees through subordinate supervisors/managers who have full, continuing responsibility to supervise as defined in Degree 4.

HUMAN RESOURCES RESPONSIBILITY *[Continued]*

Definition

This subfactor measures the continuing responsibility of the job for the supervision and direction of staff. The following characteristics of the work are to be considered in selecting a degree:

- The nature of supervision given, direct and/or indirect.
- Matrix, team and project management.
- Functional guidance to U.B.C. employees, volunteers, and student appointees supervised by other positions, individuals from other organizations, and students.

Occasional supervision, such as that performed during the absence of the supervisor on annual or other leave, is not considered.

Subfactor Levels

Degree 1

The work does not have the requirement to exercise supervision. Occasionally may explain work procedures to new or inexperienced employees.

Degree 2

Although formal supervisory responsibilities are not part of the job, the job may involve coordinating and scheduling the day-to-day work of other employees, volunteers and/or student appointees and/or interns in the unit, monitoring output and task delegation.

Degree 3

The job requires functioning as a group leader of other employees, project team, volunteers and/or student appointees with responsibilities such as scheduling and assigning work, checking work in progress and upon completion. This level does not include responsibility for personnel matters such as hiring, promoting, or appraising the work of others.

AND/OR The work requires providing functional guidance of a ***procedural nature*** with authority to ensure that procedures are carried out.

→

HUMAN RESOURCES RESPONSIBILITY *[Continued]*

Degree 4

The work involves the responsibility to supervise the activities of others. Duties involve scheduling and assigning work, providing advice and direction, making short term adjustments to staffing allocations, coordinating the activities within the unit, monitoring the quantity and quality of work against set standards. The job handles personnel matters such as appraisals and disciplinary matters and initiates the hiring, promotion and termination of staff.

AND/OR The work requires providing functional guidance of a ***policy nature*** related to a work project or program with authority to ensure compliance to university standards and policies.

Degree 5

The work involves the responsibility to manage the activities of employees, either directly or indirectly. The work involves establishing priorities, developing plans, identifying work standards. Personnel responsibilities include hiring, promoting, disciplining and appraising the work of employees.

Degree 6

The work includes managing the human resources for a major program or organizational unit. Primary concerns include determining resource requirements, making optimum use of existing person years to achieve program goals, approving proposals to recruit or terminate employees, developing overall objectives, approving the implementation of new structures, programs or policies.

COMMUNICATION & INTERPERSONAL RESPONSIBILITY

Notes to Raters

1. Communications involving specialized or detailed knowledge of a subject area are those that are complex, typically requiring specialized formal training or extensive experience to enable meaningful communication to people who do not have the same level of knowledge as the individual imparting the knowledge.

2. "Supportive counselling" is defined as providing counselling of a problem solving nature where behavioural change is not expected.

3. Communication/interpersonal responsibilities that deal with controversial or sensitive issues include those situations where people are very angry, distraught or emotional.

4. Interpersonal skills that deal with the resolution of highly sensitive issues and difficult situations affecting the future of the university include those situations where there are significant conflicts or diverse interests that must be reconciled on behalf of the university.

COMMUNICATION & INTERPERSONAL RESPONSIBILITY *[Continued]*

Definition

This subfactor measures the responsibility for effective handling of communication and interpersonal responsibilities with other staff (for those not counted under Human Resources Responsibility), students, clients, patients, volunteers, members of other organizations, (e.g., teaching hospitals, government agencies, A.M.S. and Graduate Student Society) and the general public. Consideration is given to the purpose of such communications.

Subfactor Levels

Degree 1

Purpose is to give, obtain and/or exchange factual information.

Degree 2

Purpose is to give, obtain and/or exchange information or ideas that require explanation.

Degree 3

Purpose is to advise or facilitate participation and joint effort, e.g., training, instructing. Communication involves imparting specialized or detailed knowledge of a subject area to people who do not have the same level of knowledge of the subject area.

Degree 4

Purpose is to obtain consent and/or cooperation where different points of view are expected; **OR** where communication with people or groups who may be unmotivated or uncooperative is the norm, e.g., providing supportive counselling.

Degree 5

Purpose is to negotiate and finalize agreements or policies on behalf of the unit in a context of diverging interests in which cooperation is difficult to achieve; **OR** where communication/interpersonal responsibilities deal with sensitive issues utilizing therapeutic, mediation or crisis intervention skills.

Degree 6

Purpose is to negotiate, finalize policies, agreements and strategies that have university-wide implications. Communication/interpersonal responsibilities deal with the resolution of highly sensitive issues and difficult situations affecting the future of the university.

WORKING CONDITIONS

Notes to Raters

1. Typical minor undesirable and disagreeable conditions are as follows:

   a) Slight conditions of dust, dirt, fumes, heat or cold, obnoxious odours, noise, vibration, inclement weather, poor lighting.

   b) Exposure to health and accident risks that may result in slight injuries involving the possibility of lost-time from the job limited to a few days (e.g., mild sprains, abrasions, etc.) and/or exposure to mild infectious diseases (e.g., skin rashes but not including colds).

   c) Exposure to upset people (outside of own unit) when handling complaints or having to explain administrative limitations or unpleasant decisions.

   d) Slight cuts, burns, bruises, etc. Injury causes slight discomfort for a short period of time, little inconvenience to work, and requires at most a simple protective dressing.

   e) Travel time to off-campus worksites or out-of town worksites.

   f) Required to be on call.

   g) Requirement to work hours not within typical 7:00 a.m. to 5:00 p.m. schedule with no compensation paid.

2. Typical major undesirable and disagreeable conditions are as follows:

   a) Extreme conditions of dust, dirt, fumes, heat or cold, noise, vibration, inclement weather, poor lighting.

   b) Health and accident hazards of a serious nature involving lost time beyond a few days or which may result in partial or total disability (e.g., back injuries, loss of fingers or limbs, Repetitive Strain Injury [RSI], etc.).

   c) Exposure to abusive, angry or threatening people.

   d) Severe cuts, burns, bruises, other serious injury. Injury extends beyond day of occurrence, requires change in work pattern, requires professional medical attention, and involves lost time.

   e) Body fluids and infectious conditions.

3. Consider only those conditions which are inherent in the nature of the work. Do not consider extreme situations, that is, where the risk of a specific accident or situation occurring is unlikely.

WORKING CONDITIONS *[Continued]*

4. Relate the frequency of exposure to hazards and undesirable or disagreeable working conditions to work on a continuing basis throughout the year:

	% of Total Working Time	# hours per day	# hours per week
No exposure	0%	0	0
Slight	up to 5%	up to .5	up to 2.5
Occasional	>5%-20%	>.5 to 1.5	>2.5 to 7.5
Frequent	>20%-70%	>1.5 to 5	>7.5 to 25
Almost Continuous	over 70%	over 5	over 25

5. Do not consider conditions for which premiums are paid.

6. Do not consider conditions that are correctable (e.g. inadequate lighting which may be easily corrected by providing a desk lamp or moving the desk to a more appropriate location).

WORKING CONDITIONS *[Continued]*

Definition

This subfactor is used to measure the frequency and degree of exposure to undesirable or disagreeable working conditions and hazards under which the work is performed. The following characteristics of the work are to be considered in selecting a degree:

- Exposure to such unpleasant or disagreeable conditions as dirt, dust, temperature extremes, fumes, chemicals, obnoxious odours, noise, vibration, inclement weather, poor light.
- Exposure to hazards which present a risk to health or personal safety.

Subfactor Levels

Degree 1

The work is performed in an environment with almost no exposure to disagreeable conditions and/or hazards.

Degree 2

The work is performed in an environment with occasional exposure to minor disagreeable conditions and/or hazards.

Degree 3

The work is performed in an environment with frequent exposure to minor **or** occasional exposure to major disagreeable conditions and/or hazards.

Degree 4

The work is performed in an environment with almost continuous exposure to minor **or** frequent exposure to major disagreeable conditions and/or hazards.

Degree 5

The work is performed in an environment with almost continuous exposure to major disagreeable conditions and/or hazards.

PHYSICAL DEMAND

Notes to Raters

1. In applying this subfactor, consider the fatiguing effort of the tasks performed rather than the strength or energy needed to perform the task. Always assume that the incumbent is of adequate physique for the type of work involved, regardless of sex.

2. Assign "Occasional light physical activity" to those jobs where the worker sits comfortably to do the work and is free to move about at will.

3. Examples of "light physical activity" are: lifting, pushing or pulling light weight objects.

4. Examples of "moderate physical activity" are: working in awkward positions or confined spaces, climbing ladders, lifting, pushing or pulling medium-weight objects.

5. Examples of "heavy physical activity" are: lifting, pushing or pulling heavy weight objects, lifting patients, pushing or pulling patients on stretchers or in wheel chairs, digging, use of heavy tools.

6. Standing between 5-20% of the work day without the freedom to move around is "frequent light physical activity".

7. Standing between 20-70% of the work day without the ability to move around is "frequent moderate physical activity.

8. Standing over 70% of the work day without the ability to move around is "frequent heavy physical activity."

9. Sitting without the freedom to move around, or walking, between 20-70% of the work day is "frequent light physical activity".

10. Sitting without the freedom to move around, or walking, over 70% of the work day is "continuous light physical activity".

11. Working on a computer, typewriter, word processor without the freedom to move around is defined as moderate physical activity.

12. Use the following definitions for weight:

    a) light weight: up to 22 lbs./up to 10 kilograms

    b) medium weight: 23 - 55 lbs./11 - 25 kilograms

    c) heavy weight: over 56 lbs./over 26 kilograms to a maximum of 44 kilograms.

PHYSICAL DEMAND *[Continued]*

13. Relate the frequency of physical demands to work on a continuing basis throughout the year:

	% of Total Working Time	# hours per day	# hours per week
None	0%	0	0
Slight	up to 5%	up to .5	up to 2.5
Occasional	>5 - 20%	>.5 to 1.5	>2.5 to 7.5
Frequent	>20 - 70%	>1.5 to 5	>7.5 to 25
Almost Continuous	over 70%	over 5	over 25

PHYSICAL DEMAND *[Continued]*

Definition

This subfactor refers to the physical fatigue that results from performing the duties of the job. Consider the following characteristics of the work in selecting a degree:

- The frequency of performing tasks that cause fatigue.
- The requirement to assume an uncomfortable or awkward posture.
- The requirement to lift, push or pull objects or people.

Subfactor Levels

Degree 1

The work involves occasional light physical activity.

Degree 2

The work involves frequent light physical activity **or** occasional moderate physical activity.

Degree 3

The work involves almost continuous light physical activity **or** frequent moderate physical activity **or** occasional heavy physical activity.

Degree 4

The work involves almost continuous moderate physical activity **or** frequent heavy physical activity.

Degree 5

The work involves almost continuous heavy physical activity.

SENSORY DEMAND

Notes to Raters

1. In applying this subfactor, consider the fatigue resulting from visual or auditory (listening) concentration. To do this analysis, analyze the character of the activities and determine the phases of the work requiring a concentrated effort, their duration and frequency.

2. Sensory concentration is the focusing of the senses (eyes, ears, etc.) on various phases of the work, for example, reading, driving, doing precision work, counselling, teaching, report writing, word processing, etc.

3. Measure the duration of sensory concentration as follows; short (about one hour or less), intermediate (more than one hour but no more than two hours) or long (more than two hours) periods of activity, which should not be interrupted.

4. Relate the frequency of short, intermediate or long periods of visual concentration to work on a continuing basis throughout the year.

	% of Total Working Time	# hrs per day	# hrs per week
Slight	up to 5%	up to .5	up to 2.5
Occasional	>5 - 20%	>.5 to 1.5	>2.5 to 7.5
Frequent	>20 - 70%	>1.5 to 5	>7.5 to 25
Almost Continuous	over 70%	over 5	over 25

SENSORY DEMAND *[Continued]*

Definition

This subfactor refers to the mental, visual and/or auditory fatigue that results from performing the duties of the job. Consider the following characteristics of the work in selecting a degree:

- The frequency of performing tasks that cause sensory fatigue.
- The length of time spent on tasks that cause sensory fatigue.

Subfactor Levels

Degree 1

The work involves occasional short periods of concentration which result in only normal sensory concentration.

Degree 2

The work involves frequent short, or occasional intermediate periods of sensory concentration.

Degree 3

The work involves almost continuous short, **or** frequent intermediate **or** occasional lengthy periods of sensory concentration.

Degree 4

The work involves almost continuous intermediate **or** frequent lengthy periods of sensory concentration.

Degree 5

The work involves almost continuous lengthy periods of sensory concentration.

The University of British Columbia

STANDARD JOB DESCRIPTION

Job Title: LIBRARY ASSISTANT 1 **Pay Grade:** 1

Level Definition: This level covers positions which involve a variety of duties of limited complexity. Work is performed in accordance with clearly defined guidelines and procedures.

Typical Duties:

- Charges and discharges circulating materials.
- Types from source materials such items as routine lists, memoranda, spine labels, labels, invoices, statements, charge account cards and catalogue cards.
- Opens, sorts, date-stamps and distributes incoming mail; collects and processes out-going mail.
- Operates and assists users in the operation of copying machines; performs routine maintenance duties.
- Does simple sorting, assembling and filing of materials.
- Assists with routine preparation of new books, such as, inserting plates and book pockets, laminating dust jackets, and routing finished volumes to their destination.
- Collects, sorts, shelves, shelf-reads, arranges, straightens, checks and transports materials.
- Assists with repairing of library materials.
- Provides routine directional assistance to library patrons and takes requests.
- Performs other duties related to qualifications and requirements of the job.

Decision Making: The nature of the work is routine and clearly defined. All problems are referred to supervisor.

Supervision Received: Employees are given detailed instructions and guidelines and work is performed under supervision. It is expected that familiar routines will be carried out without ongoing instruction.

Supervision Exercised: Employees in this class do not supervise, but may be asked to show simple routines to others.

Minimum Qualifications

Education: High school graduation.

Experience: On-the-job training is provided.

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Skills: Ability to type at 40 w.p.m. and to operate the normal range of library equipment as may be required, such as, copying machines, microfiche/film readers, data entry systems and calculators; ability to follow and to carry out instructions; good communication skills in public service positions; may require basic reading knowledge of a foreign language.

The University of British Columbia

STANDARD JOB DESCRIPTION

Job Title: LIBRARY ASSISTANT 2 **Pay Grade:** 3

Level Definition: This level covers positions which involve moderately complex tasks requiring a general knowledge of library guidelines and procedures.

Typical Duties: May perform any of the duties at the Library Assistant 1 level and in addition:

- Maintains and updates various kinds of files, including administrative and correspondence files, manuals, and card files in accordance with established systems.
- Does routine processing of new books and materials by matching with orders, recording receipts, verifying account cards for invoices, returning duplicate and defective items, and conducts preliminary investigations of missing and variant orders.
- Prepares and processes materials to be bound, including checking for faults and gaps, preparing binding forms, requesting replacements for missing issues.
- Repairs library materials, including tipping in loose pages, reinforcing covers at hinges, inserting indexes/contents/title pages, copying torn or missing pages, supplying new spines, re-edging ragged corners.
- Assists in the maintenance of stacks and microcataloques, including shelf-reading, shelving, book moving and inventory.
- Does routine searching, including pre-order, pre-catalogue, traces and quotations.
- Answers routine questions and written enquiries which normally require use of form letters.
- Maintains check-in system for periodicals involving claiming and follow-up procedures.
- Sends out overdue and recall notes.
- Maintains record of payments for materials and prepares invoices for final processing.
- Converts holding records for serials and/or monographs into machine readable form, and edits records already in machine readable form.
- Performs other duties related to qualifications and requirements of the job.

Decision Making: Works within well defined guidelines and procedures in establishing priorities and carrying tasks through to completion. New or unusual problems are referred to supervisor.

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Supervision Received:	Receives detailed instructions during orientation and on subsequent new assignments or changes in procedure. Carries out familiar phases of the work independently under general supervision.
Supervision Exercised:	May coordinate the work of, and provide assistance to employees at a lower classification.

Minimum Qualifications

Education:	High school graduation.
Experience:	Two years' related experience or one-year U.B.C. Library experience.
Skills:	Ability to type at 50 w.p.m. and to operate the normal range of library equipment, such as, copying machines, microfiche/film readers, data entry systems and calculators. Ability to coordinate work of staff at lower classifications; may require reading knowledge of a foreign language; good oral communication in public service areas; ability to follow and to carry out instructions.

STANDARD JOB DESCRIPTION

Job Title: LIBRARY ASSISTANT 3 **Pay Grade:** 6

Level Definition: This level covers positions which involve diversified, complex duties requiring a comprehensive knowledge of library procedures and policies.

Typical Duties: May perform any of the duties at the lower Library Assistant levels and, in addition:

- Is responsible for operation of a Loan Desk as assigned.
- Receives and processes incoming library materials, resolving problems as necessary.
- Maintains exchange programs for library materials with other academic institutions.
- Handles the control, bibliographic searching, verification and derivitive cataloguing of all materials assigned; maintains D.C.F. and authority files.
- Provides simple and basic reference assistance.
- Maintains the Central Serials Record, revising and updating as required.
- Attends to all phases of the claims operation.
- Checks in complex materials and those requiring special attention and treatment.
- Converts bibliographic records for serials and/or monographs into machine readable form, and edits records already in machine readable form.
- Is responsible for setting up new orders and for follow-up on all orders until they are active, filled or cancelled; assists in solving order, invoice and cancellation problems.
- Responsible for directing the preparation and processing of materials for binding.
- Maintains all records associated with Computer assisted Bibliographic Services.
- Is responsible for stack maintenance which includes training, work assignment and checking work of any Library Assistant 1's and students assigned to assist; shelving of books and other materials; scheduling of and participating in shelfreading to correct shelving errors; removing worn books and books with incorrect or illegible call numbers; carrying out space adjustments to alleviate overcrowding; clearing carrels daily of books not signed out; assists supervisor in coordinating major book shifts and removals to storage as directed; ensuring equipment is kept in working order and contacting appropriate manitenance person when required; reporting malfunctioning lights; maintaining equipment inventory, etc.

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- Performs other duties related to qualifications and requirements of the job.

Decision Making: The nature of the work demands judgment in planning the sequence of duties, the work methods to be employed and the action to be taken. Makes decisions based on a comprehensive knowledge of library guidelines and established precedents. New or unusual problems are referred to supervisor.

Supervision Received: Work is done under limited supervision. Performs assigned duties independently and in accordance with established practices and procedures.

Supervision Exercised: Generally responsible for training and overseeing the work of positions at lower classifications, may have input into staff selection and performance evalution of employees.

Minimum Qualifications

Education: Completion of a recognized two-year Library Technicians Program or a University degree or a combination of training and experience.

Experience: Without the two-year recognized Library Technician diploma or a University degree, high school graduation with three years' library experience, with one year at the Library Assistant 2 level.

Skills: Ability to type at 40 w.p.m. and operate the normal range of library equipment, such as, copying machines, microfiche/film readers, data entry systems and calculators.

May require fluency in a foreign language or special training, ability to supervise; above average verbal and written communication skills in public service areas.

STANDARD JOB DESCRIPTION

Job Title: LIBRARY ASSISTANT 4

Pay Grade: 8

Level Definition: This level covers positions which involve the planning, supervision, and/or execution of work in a specialized section of the Library or, reference, cataloguing or bibliographic work in a subject or language area, requiring a comprehensive knowledge of library routines, policies, guidelines and procedures.

Typical Duties: May perform any of the duties at the lower Library Assistant levels and, in addition:

- Plans and coordinates all work connected with the receipt of books, serials or other materials purchased by the Library.
- Supervises and coordinates functions at a loan desk, including the training and overseeing of staff, instruction in new techniques and routines, re-scheduling of staff, interpreting circulation procedures and lending regulations to staff borrowers, and preparing statistics and reports.
- Selects library suppliers in accordance with guidelines and/or instructions from supervisor.
- Supervises distribution of materials to technical services division for processing.
- Performs full M.A.R.C. coding of bibliographic and holdings records and is responsible for the control, bibliographic searching and derivative cataloguing of all material in the section and for maintenance of the D.C.F.
- Catalogues serials (original or LC copy) and monograph open entries (with LC only).
- Is responsible for the general maintenance of the card catalogues and maintenance of the subject guide card and cross reference system.
- Creates simple original catalogue copy under supervision.
- Provides full reference service to library patrons.
- Is responsible for the planning, scheduling and coordination of all activities and needs related to stack maintenance. Recommends level of experience and numbers of staff needed. Trains and supervises one or more Library Assistant 3's who asssist with training and supervision of more junior staff and student assistants. Plans and directs both minor and major book moves to alleviate crowding of collections. Forecasts future space requirements. Participates in shelving of books, clearance of carrels and schedules/participates in shelf-reading.
- Performs other duties related to qualifications and requirements of the job.

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Decision Making:	Generally responsible for planning and supervising an effective work flow through several positions at lower classifications and initiating work methods and procedures relative to the specialized work of the section. Works within the framework of established policies, regulations and procedures with opportunity to exercise judgement in the interpretation of procedures.
Supervision Received:	Works independently under general direction; receives instruction on assignment of new duties, and thereafter only on new or unusual problems.
Supervision Exercised:	Generally supervises an effective flow of work through several positions at varying classification levels, and may have input into staff selection and performance evaluation of employees.

Minimum Qualifications

Education:	Completion of a recognized two-year Library Technicians Program or a University degree or a combination of training and related experience.
Experience:	With a Library Technicians' diploma or a University degree, one year experience at the Library Assistant 3 level. With high school graduation four years' library experience with one year at the Library Assistant 3 level.
Skills:	Ability to type at 40 w.p.m. and operate the normal range of library equipment as may be required, such as, copying machines, microfiche/film readers, data entry systems and calculators. Special language or subject training as required; proven supervisory and administrative skills; above average written and oral communication skills.

The University of British Columbia

STANDARD JOB DESCRIPTION

Job Title: LIBRARY ASSISTANT 5 **Pay Grade:** 9

Level Definition: This level covers positions which require a comprehensive knowledge of major library functions, and which involve diversified, complex duties, with responsibility for planning, organizing and directing the work flow of a section through most levels of Library Assistants.

Typical Duties:

- Plans, coordinates and schedules the work of a specialized function within a library division involved in such activities as Circulation, L.C. Cataloguing, Bibliographic Searching.
- Plans manpower requirements; trains and supervises staff.
- Determines work priorities and allocates assignments to avoid bottlenecks, and to achieve a smooth workflow, a good service to users, and good public relations.
- Expedites rush items and investigates snags and problems; revises book requisitions to avoid expensive duplication, and ensures that books have been charged to the correct book fund.
- Assesses effectiveness of work methods and procedures on an on-going basis and suggests changes to supervisor as required.
- Deals with enquiries and complaints from students and the public, interpreting policies and procedures as necessary; takes appropriate action to solve such problems.
- Assembles and submits periodic reports and statistics.
- Performs other duties related to qualifications and requirements of the job.

Decision Making: Plans and directs the workflow and exercises considerable judgement within established procedures and guidelines. Operational decisions are normally arrived at through consultation and discussion rather than from directives of supervisor.

Supervision Received: Works independently under general administrative direction. Would refer matters requiring policy decision to supervisor.

Supervision Exercised: Trains, directs activities of, and oversees work of a large staff including most levels of library assistants up to the Library Assistant 4 level. May have input into staff selection and performance evaluation of employees.

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Minimum Qualifications

Education: Completion of a recognized two-year Library Technicians Program or a University degree or a combination of training and related experience.

Experience: With completion of Library Technician program or a University degree two years' Library experience with one year at the Library Assistant 4 level. Without the Library Technician program or a University degree, high school graduation and five years' Library experience, with one year at the Library Assistant 4 level.

Skills: Ability to type at 40 w.p.m. and operate the normal range of library equipment, as may be required, such as, copying machines, microfiche/film readers, data entry systems and calculators.

A knowledge of more than one major function of the Library; proven supervisory and administrative skills; above average written and oral communication skills.

University of Maryland System
Job Class Specification

TITLE: LIBRARY ASSISTANT
FLSA: NONEXEMPT
EEO6: H40

JOB CODE: N02LBA
JOB TYPE: SYSTEMWIDE
JOB FAMILY/SERIES: LIB

APPROVED BY: Donald N. Langenberg
Chancellor Donald N. Langenberg

EFFECTIVE DATE: 07/01/96

JOB SUMMARY

Under direct supervision, performs routine repetitive clerical and/or non-complex library duties using manual and automated library systems.

PRIMARY DUTIES

1. Searches and retrieves materials from library stacks. Sorts and shelves materials. Provides library users with information and directional assistance in retrieving material from library stacks.

2. Charges and discharges circulating library materials on automated systems and sensitizing material.

3. Searches manual and automated files to verify holdings or bibliographic information.

4. Verifies shipment contents and property stamps materials; checks in library material.

5. Performs repetitive bindery procedures such as copying, ordering, retrieving replacement pages and tipping into documents.

6. Assists in ordering and storing library inventory or supplies and work forms.

7. Performs routine clerical tasks such as opening and distributing mail, photocopying, collecting and compiling statistics, filing, typing, and periodical maintenance.

8. Participates as needed in training or monitoring student help.

Note: The intent of this list of primary duties is to provide a representative summary of the major duties and responsibilities of this job. Incumbents perform other related duties assigned. Specific duties and responsibilities may vary based upon departmental needs.

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MINIMUM QUALIFICATIONS

EDUCATION: High School Diploma or GED

REQUIRED KNOWLEDGE/SKILLS/ABILITIES:

Skill in alphabetic and numeric filing. Ability to learn and understand library terminology and functions; to communicate effectively; to establish and maintain effective working relationships with library users and staff; to lift, transport, sort and shelve library materials; to operate standard library and office equipment including personal computers and library software, photocopiers, microfilm and microfiche readers.

OTHER: Except for qualifications established by law, additional related experience and formal education in which one has gained the knowledge, skills, and abilities required for full performance of the work of the job class may be substituted for the education or experience requirement on a year-for-year basis with 30 college credits being equivalent to one year of experience.

University of Maryland System
Job Class Specification

TITLE: LIBRARY TECHNICIAN I
FLSA: NONEXEMPT
EEO6: H40

JOB CODE: N04LB1
JOB TYPE: SYSTEMWIDE
JOB FAMILY/SERIES: LIB

APPROVED BY: Donald N. Langenberg
Chancellor Donald N. Langenberg

EFFECTIVE DATE: 07/01/96

JOB SUMMARY

Under general supervision, functions as a first level technician performing a variety of library clerical and technical duties of moderate complexity as appropriate to the diverse operations and specialized procedures of the library unit where assigned. Leads and trains personnel.

PRIMARY DUTIES

1. Utilizes library software systems to retrieve and enter data.

2. Collects and prepares materials for binding, maintains binding records, annotates unit shelflist and record of serial holding. Processes binding transfers, withdrawals, title changes, claims, requests for back issues and missing pages; etc.

3. Searches Online Computer Library Center (OCLC) and other databases for cataloging copy, inputs bibliographic data, original cataloging copy, and edited cataloging copy to OCLC and library's automated online library systems.

4. Prepares purchase orders online for library materials, verifies and corrects discrepancies, and monitors fund depletion.

5. Checks in books online and sorts incoming materials into appropriate cataloging queues.

6. Charges and renews books and material loans for library users using automated circulation system backup procedures as necessary.

7. Enters data such as fines and billing information into automated system, and generates reports and notices.

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PRIMARY DUTIES (continued)

8. Answers inquiries regarding basic circulation policies such as loan periods, fines, recalls, claims, holds, shelving and borrowing. Assists library users in accessing systems.

9. Monitors the physical processing of newly acquired materials such as property stamping, security stripping, attaching call number labels, barcoding, insertion of pockets, and adding due date slips.

10. Sorts, packs and unpacks materials going to and returning from commercial binders, verifying bindery shipping and receiving records.

11. Assembles and compiles a variety of information and data for reports, studies and other purposes following prescribed methods. Examines and verifies statistical and other reports for completeness and accuracy of computations.

12. Participates as instructed in the training and supervision of Library Assistants and students.

Note: The intent of this list of primary duties is to provide a representative summary of the major duties and responsibilities of this job. Incumbents perform other related duties assigned. Specific duties and responsibilities may vary based upon departmental needs.

MINIMUM QUALIFICATIONS

EDUCATION: High School Diploma or GED

EXPERIENCE: One year of library or related clerical or public service experience.

REQUIRED KNOWLEDGE/SKILLS/ABILITIES:

Working knowledge of the nature and function of libraries; of library services, practices and procedures. Skill in alphabetic and numeric filing and using a personal computer and library software to input and retrieve information. Ability to communicate effectively; to establish and maintain effective working relationships with library users and staff; to provide guidance and instruction to subordinate personnel; to work independently and exercise initiative in applying rules, procedures and instructions; to pack and unpack library materials.

OTHER: Except for qualifications established by law, additional related experience and formal education in which one has gained the knowledge, skills, and abilities required for full performance of the work of the job class may be substituted for the education or experience requirement on a year-for-year basis with 30 college credits being equivalent to one year of experience.

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University of Maryland System
Job Class Specification

TITLE: LIBRARY TECHNICIAN II
FLSA: NONEXEMPT
EEO6: E40

JOB CODE: N07LB2
JOB TYPE: SYSTEMWIDE
JOB FAMILY/SERIES: LIB

APPROVED BY: Donald N. Langenberg
Chancellor Donald N. Langenberg

EFFECTIVE DATE: 07/01/9

JOB SUMMARY

Under general supervision, performs a variety of detailed, moderately complex technical support duties within one or more functional areas of the library requiring skill in and understanding of established library methods, procedures, and the use of specific library tools within the functional area where assigned. Leads and trains personnel.

PRIMARY DUTIES

1. Provides general information on library services and answers questions from library users. Instructs users in the use of library systems and equipment and provides general information on the use of library facilities and services.

2. Searches for cataloging copy for library materials in any format using romanized characters. Makes adjustments to print and online records in accordance with cataloging policies and rules. Enters data to online information management systems.

3. Checks-in and enters new materials into library's automated systems and answers inquiries regarding receipt of materials.

4. Maintains online claim system for non-receipt of materials. Posts, codes, and processes invoices for payment and inputs data into automated acquisition system. Identifies and solves problems related to invoices.

5. Searches standard print and online sources to verify bibliographic information and availability. Leads others in creating bibliographic records, acquisitions or interlibrary loan requests ensuring completeness and accuracy.

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PRIMARY DUTIES (continued)

6. Assembles and prepares a variety of information and statistical data and supervises the checking and processing of data for reports, special studies and other purposes. Assures completeness of reports and accuracy of computations.

7. Assists in maintaining workflow of functional unit(s), reviews and monitors the work of subordinate personnel, and provides guidance and instruction to staff in unit procedures.

8. Performs specialized clerical procedures for adding material to library collections such as updating shelflist and online serials list, preparing volumes for binding, verifying material against existing cataloging and reporting discrepancies.

Note: The intent of this list of primary duties is to provide a representative summary of the major duties and responsibilities of this job. Incumbents perform other related duties assigned. Specific duties and responsibilities may vary based upon departmental needs.

MINIMUM QUALIFICATIONS

EDUCATION: High School Diploma or GED

EXPERIENCE: Three years experience directly related to the primary duties of the position.

REQUIRED KNOWLEDGE/SKILLS/ABILITIES:

General knowledge and understanding of the nature and function of libraries; of library services, standards and procedures; of bibliographic records, publishing and publication formats, and library information storage and retrieval systems. Skill in alphabetic and numeric filing; in using a computer terminal to input and retrieve information; in interpreting and applying library policies and procedures; and in analyzing problems of a moderately complex nature. Ability to communicate effectively; to establish and maintain effective working relationships with library users and staff; to provide guidance and instruction to subordinate personnel; to work independently; and to exercise initiative in interpreting and applying rules, procedures, and instructions.

OTHER: Except for qualifications established by law, additional related experience and formal education in which one has gained the knowledge, skills, and abilities required for full performance of the work of the job class may be substituted for the education or experience requirement on a year-for-year basis with 30 college credits being equivalent to one year of experience.

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University of Maryland System
Job Class Specification

TITLE: LIBRARY TECHNICIAN III
FLSA: NONEXEMPT
EEO6: H40

JOB CODE: N10LB3
JOB TYPE: SYSTEMWIDE
JOB FAMILY/SERIES: LIB

APPROVED BY: Donald N. Langenberg
Chancellor Donald N. Langenberg

EFFECTIVE DATE: 07/01/9[illegible]

JOB SUMMARY

Under general supervision, performs a variety of technical support duties and maintains workflow in a specialized unit or library function where professional guidance is not available on a regular basis. Supervises and trains subordinate personnel.

PRIMARY DUTIES

1. Supervises staff and/or services of a unit or function such as billing or stack maintenance. Changes system and develops complex data input parameters as needed. Resolves problems and complaints.

2. Monitors and ensures accuracy and consistency of information in databases.

3. Determines work priorities of assigned staff, trains and evaluates staff performance.

4. Coordinates the technical service aspects of a public service unit such as the input, maintenance, and accuracy of manual and computerized bibliographic files and databases.

5. Coordinates bindery or restoration and repair activities for library. Assesses value, condition and potential use of material. Solves bindery problems and determines from guidelines the appropriate style, alternatives and treatment of materials.

6. Edits problematic bibiliographic entries for library's online automated system using accepted library standards and procedures.

7. Provides basic reference services to users such as answering routine requests for information using standard reference sources and providing correct citations for incomplete and inaccurate bibliographic descriptions.

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PRIMARY DUTIES (continued)

8. Provides individual instruction on the use of online catalog and other library files. Interprets library policy to users.

9. Authorizes the receipt of shipments of materials. Corresponds with vendors regarding claims and credits incomplete or duplicate shipments. Reviews and certifies accuracy of invoices ensuring records accurately reflects state mandated codes.

Note: The intent of this list of primary duties is to provide a representative summary of the major duties and responsibilities of this job. Incumbents perform other related duties assigned. Specific duties and responsibilities may vary based upon departmental needs.

MINIMUM QUALIFICATIONS

EDUCATION: High School Diploma or GED

EXPERIENCE: Five years progressively responsible experience directly related to the primary duties of the position.

REQUIRED KNOWLEDGE/SKILLS/ABILITIES:

Thorough knowledge and understanding of the nature and function of libraries, of library services, standards and procedures; of bibliographic tools and records, publishing and publication formats and library information storage and retrieval systems. Skill in interpreting and applying library policies, procedures and explaining technical material such as local and national library standards and rules; in using a computer terminal to input and retrieve information; in resolving library technical support problems; in alphabetic and numeric filing; in communicating effectively; in establishing and maintaining effective work relationships with library users and staff. Ability to work independently on multiple tasks; to supervise and train subordinate personnel; and to organize work involving conflicting demands.

OTHER: Except for qualifications established by law, additional related experience and formal education in which one has gained the knowledge, skills, and abilities required for full performance of the work of the job class may be substituted for the education or experience requirement on a year-for-year basis with 30 college credits being equivalent to one year of experience.

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Classification Matrix

In 1987, the Working Group on Support Staff Issues convened a special task group to examine the support staff classification system used by MIT. After a year and a half this group issued a report which contained a range of recommendations, such as the need to update the job descriptions, to include non-traditional experience when evaluating applicants, and to eliminate the requirement of a typing test for non-clerical positions. This report is available from the Working Group.

One of the primary recommendations of this report was that support staff job descriptions be updated to reflect current technology and practices at the Institute. The Personnel Office accepted this recommendation and in turn asked the Working Group to assist them in this effort. The original report used the device of a matrix as a way of examining differences in the four levels of the classification structure. The Personnel Office decided to adapt this concept and to expand upon it as a tool for the use of personnel officers, administrative officers and supervisors.

The theory of the Classification Matrix is that similar duties are assigned across the spectrum of support staff positions and it is the way in which these tasks are performed that distinguishes the relative "level" of each position. The matrix is organized by function or duty. Each function has as many as four levels of performance associated with it and each level reflects increasing responsibilities and complexity. Each level of the matrix, by definition, incorporates the activities included in the preceding levels. For example, secretaries or clerical assistants at all four levels might "assist in the preparation of reports and projects". At the lowest level, this duty might consist entirely of typing text from draft or photocopying. At the highest level, this might include the organization of the report, editorial responsibilities, the assembly of data or the final comparison of publisher galleys against the original manuscript.

The committee which has been working on this matrix has not attempted to identify every task ever performed by a member of the support staff at MIT. It has consulted extensively with administrators and support staff in an attempt to capture the most common functions and the most common levels of performance and complexity associated with those functions. There will always be variations in how and to whom tasks are assigned in different areas or departments within the Institute. The matrix, itself, is meant to be illustrative and to provide a guide for administrators and supervisors as they assemble and evaluate job descriptions.

A suggested use of this matrix would be for a supervisor to assemble a description of a position which included the primary duties to be assigned to an employee, the amount of effort to be devoted to each task, and the level of performance and complexity of each task. This job description would then be compared against the matrix. Based upon the alignment of the duties with the matrix, a decision could then be made about the appropriate level of the position being posted. For example, a position might contain seven primary duties, one of which was to be performed at the next to highest level, one at the lowest level, and the rest at the next to lowest level. Therefore, that position would most likely be classified at the next to lowest level. If, on the other hand, the one duty to be performed at the next to highest level accounted for 75% of the employee's time, then the job might be better classified as the higher level.

The matrix might also be used to highlight unrealistic expectations, such as too low or too high a level of performance based upon training and experience. This matrix is not intended to channel all new employees into entry level job classifications or necessitate a reclassification of current support staff. It is, however, intended to encourage a broader use of the current classification structure by demonstrating that many skills can be performed by employees at all points on the spectrum. This in turn should result in additional opportunities for advancement for the support staff.

The committee which assembled this material included: Joyce Cooper (Plasma Fusion Center), Brian Donahue (Lincoln Laboratory), Suzanne Doucette (Biology Department), Linda Hampson (Lincoln Laboratory), Sheila Kanode (Dean of Engineering), Angela Katsos (Resource Development), Lillian O'Malley (Chemistry and Physical Plant), Evelyn Perez (Dean of Science), Lydia Snover (Planning Office), Cynthia Vallino (Personnel Office), Robert VandePitte (OSP), Mary McGonagle (OSP), and Kerry Wilson (Personnel Office).

Revised Tuesday, May 21, 1991

Classification Matrix

	Function	Lowest Level			Highest Level
	Clerical				
	Assist in preparation of reports and projects, etc.	Type text from draft. Photocopy.	Type text into specific word-processing package according to specified organization. Assemble final document; distribute final document; maintain hard as well as computer copies of all documents.	Type text into specific word-processing package using multiple files (i.e. list processing); light editing; combine multiple types of technical information (i.e., graphics) into text. Might be responsible for organizational consistency, and/or adherence to a specific publisher's guidelines.	Assist supervisor with organization of report preparation, definition, research (library), verification of information (references). Major editing (grammar and style) responsibilities. Directly work with contributors in assembling data. Check publisher's galley proofs against original manuscript.
	Assist in preparation of Newsletters or other publications.	Distribute and mail out newsletters and other publications.	Collect information from contributors. Update mailing lists.	Type text into predetermined format. Check for grammar and punctuation. Obtain necessary clearances (copyrights).	Assist in researching and drafting. articles; layout and paste up (may use advanced word processing package). Negotiate prices, schedules, etc. with Graphic Arts or other printers; decide on paper and print.
	Prepare correspondence with, for, or on behalf of supervisor, director, or senior staff member.	Copy, distribute, and deliver to other Institute offices.	Type text from draft or dictation using word processor program. Circulate to other pertinent members of staff for comments. Compile information, type, return to supervisor for approval and signature. Distribute.	Type text from draft or dictation using word processor program. Work with supervisor on substantive or stylistic aspects of correspondence. Obtain supervisor's signature, distribute. Send appropriate form letters in response to specific requests. Help coordinate large mailings.	Type text from draft or dictation using word processor program. Compose correspondence to be distributed under own name. Draft correspondence to be sent under supervisor's name. Coordinate large mailings. Direct problematic requests to the appropriate staff.
	Take Meeting Notes and/or Minutes.	Not applicable	Take notes at meetings. Transcribe for file.	Take notes or minutes at meetings, transcribe, correct, and distribute.	Take notes or minutes of complex meetings, transcribe, edit, and distribute.

Classification Matrix

	Function	Lowest Level			Highest Level
	Organizational				
	Organize office, i.e., filing system, use of equipment,workload, and approaching projects.	File all documents as indicated. Maintain logs of incoming correspondence.	Maintain filing system to reflect new topics, etc. Maintain signup lists for use of equipment.	Investigate possible new filing procedures (i.e., electronic databases versus paper only); implement, integrate, and maintain systems; Train new support or temporary staff. Maintain chrono file.	Initiate and/organize new filing systems or alter existing systems to meet changing requirements. Monitor chrono file and advise supervisor of approaching deadlines and anticipate yearly projects.
	Distribute work to other support personnel. Train other staff on local equipment.	Sort and distribute within local office; refer correspondence to staff.	Sort and distribute incoming correspondence based upon content and knowledge of office work flow.	May distribute work among one or more support staff. May direct work given to student employees.	Distribute work to support staff. Supervise student employees, temporary help. Advise supervisors of work flow responsibilities and problems.
	Maintain Office Equipment, including computer equipment, Supplies Inventory. Maintain Office and computer supplies inventory and other inventory items. Provide training on computers and software as needed.	Maintain simple office equipment such as postage meters, scales, etc. Pick up supplies, verify deliveries with orders.	Provide rudimentary training on local equipment, software packages and applications to other members of office, laboratory, or department. Check inventories, and prepare orders for supervisor approval (no signatory power). Act as key operator on office or department copier, word processing equipment and printers.	May act as local resource on local software applications. Act as liaison with other computer "experts". Provide more detailed training of other staff members. Maintain documentation library. Order supplies as necessary. Identify vendors, quality and delivery schedule (limited signatory power). Monitor maintenance agreements. Inform other staff members of selected vendors and contract specifications.	May assist with assembly of pc equipment and periphals at office level. May install third party computer boards. Make suggestions of purchases of new software. Order non-inventoried items as needed (implying signatory authorization), research vendors (both in house and external). Make suggestions as to future purchases of supplies not currently inventoried
	Maintain calendar or appointment book for one or more individuals.	Not Applicable	Note appointments made by supervisor in office calendar. Prepare daily calendar for supervisor(s) and other staff.	Schedule appointments for supervisor or staff after discussion .	Schedule appointments based upon knowledge of request, staff, and issues.

Each level incorporates the activities included in preceding levels. All duties listed are meant to be illustrative of possible activities associated with each function at various levels.

Classification Matrix

	Function	Lowest Level			Highest Level
	Serve as Information Source	Answer telephone, transfer calls and take messages. Distribute publications (i.e. catalogues)	Answer the telephone, take messages, greet visitors. Distribute Institute publications in response to specific requests. Give directions and/or instructions when necessary. Maintain records of requests for materials and other information.	Screen calls, refer to appropriate person. Give substantive answers on established policies. Exercise discretion. Attend meetings on behalf of local office or department. Distribute materials, maintain records and/or monies where appropriate (i.e sell class notes). Reorder and/or reproduce materials when appropriate.	Exercising discretion may give interpretive answers on policies or work in progress. Represent office or department at Institute meetings. With guidance may interpret pertinent policies when distributing verbal or printed information.
	Personnel/Appointment/Hiring Process				
	Academic (including foreign visitors)	Distribute forms, letters, etc.	Issue Institute documentation needed to complete hiring process. Send out VISA forms. Issue Key cards, obtain authorizing signatures; collect keys upon termination of employment and maintain database.	Prepare academic appointment forms; collect employment documentation. Maintain database with reappointment information. Notify supervisors of reappointment dates. Prepare termination forms.	Verify salary distribution with supervisors. Review documentation. Prepare summary reports.
	Staff and Non-Exempt	Distribute forms, letters, etc.	Issue Institute documentation needed to complete hiring process. Issue Key cards, obtain authorizing signatures; collect keys upon termination of employment and maintain database.	Prepare initial job description and/or advertising material. Prepare termination forms.	Prescreen applications. Verify salary distribution with supervisors. Review documentation. Prepare summary reports.
	New Employee Orientation	Not applicable	Distribute departmental or laboratory orientation material.	Distribute departmental or laboratory orientation material.	Provide personal orientation; (i.e., administer safety quiz.)

Each level incorporates the activities included in preceding levels. All duties listed are meant to be illustrative of possible activities associated with each function at various levels.

Classification Matrix

	Function	Lowest Level			Highest Level
	Organize meetings, Travel and Visitors				
	Institute meetings-held at MIT, attended primarily by MIT staff.	Set up room, provide supplies as specified by supervisor	Identify and reserve rooms, arrange for catering, audio-visual, etc. Take minutes, etc.	Coordinate scheduling of meeting with attendees, coordinate physical arrangements. Produce and distribute written agendas and background material.	Coordinate administrative aspects of meetings, especially regularly scheduled meetings, i.e., School Councils, or special presidential committees (some confidential)
	External meetings- *Meetings held not at MIT but administratively organized by MIT staff* *or* *Meetings held primarily at MIT, but attended by non-MIT Staff*	Not applicable	Coordinate some clerical aspects of meetings, i.e., responses or reservations, Collect and/organize written papers and/or abstracts.	Coordinate some administrative aspects of meetings sponsored by supervisor or department (i.e., reserve rooms, arrange transportation, attend dinners and tours).	Meet with various vendors and hotels to arrange facilities, oversee written and published materials submitted and distributed. Work with Professionals to set up schedules, arrange hotel and travel accommodations, etc.
	Make Travel arrangements for supervisors and/or other personnel.	Not applicable	Determine available flights and times.	Make travel reservations; obtain travel advances; complete required paperwork.	Coordinate schedules of several individuals; interact with travel agency regarding pricing, scheduling, etc.; provide contingency plans; provide summaries and/or itineraries to appropriate staff.
	Coordinate visits to Campus and/or Lincoln Laboratory of non-MIT Personnel.	Not applicable	At Lincoln, coordinate visits and/or documentation requirements with laboratory security; Set up meetings with appropriate personnel; arrange hotel/transportation for visitors; escort visitors within the Laboratory.	On campus, Set up meetings with appropriate Institute personnel; arrange hotel/transportation for visitors; escort visitors on campus.	

Each level incorporates the activities included in preceding levels. All duties listed are meant to be illustrative of possible activities associated with each function at various levels.

Classification Matrix

	Function	Lowest Level			Highest Level
	Financial				
	Financial Management (May have limited signatory power in upper levels).	Match invoices with P.O.s. Maintain account files.	Check invoices against P.O.s and packing slips, match or file by account number, prepare for supervisor approval. Prepare requisitions (using paper or EREQ), request for payments, petty cash, transfer vouchers; assemble appropriate backup.	Use spreadsheet template to monitor status of accounts for office. Check records against accounting statements; follow up on errors, etc. Approve and/or process requisitions (using paper or EREQ); prepare payroll documents, gather information needed for budget preparation.	Organize administrative systems for use in monitoring expenditures, etc.. Check records. Approve requisitions (using paper or EREQ) and invoices. Produce graphic displays of spending patterns, etc. Confer with Administrative Office on account status and inform supervisor of problems and required actions. Inform administrative office of distribution changes. Act as liaison and interface between supervisor and administrative offices.
	Preparation and review of budget/research proposals.	Not applicable	Research particular budget items, (i.e., obtain equipment quotes, per diem costs, specific costs for material and supplies). Maintain files on budget proposals submitted and revised.	Refer budget proposals to the appropriate Institute official for approval. Compare proposals against sponsor requirements (i.e. human use form, etc.) and assemble required documentation. Distribute copies to co-investigators.	Check budgets for correctness and compliance with sponsor requirements. Check for completeness. Deal directly with submitting office to clarify issues or request additional information. Draft any accompanying correspondence or required reply. Assist or collaborate with supervisor in development of budget proposal.

Each level incorporates the activities included in preceding levels. All duties listed are meant to be illustrative of possible activities associated with each function at various levels.

	Function	Lowest Level			Highest Level
	Payroll				
	Staff (Faculty, Research, Administrative, etc.) Monthly Payroll Distribution Reports	Not applicable	In Headquarters area: Distribute form letters to faculty at specified times in payroll cycle. Follow up on completions. Maintain files containing documentation and/or database.	In Headquarters area: Follow up requests for information, check account numbers. In individual research area: based upon financial management projections, generate list of necessary changes in distribution to be requested by supervisor.	In Headquarters area: compile and send out letters to supervisors indicating current salary distributions and requesting changes. Collect documentation with appropriate authorizations. Prepare list of changes or transcribe changes on monthly distribution forms for review of Department Administrator, Director or Department Head.
	Staff Vacation Reports	Not applicable	Maintain departmental records/ database.	Transfer departmental information to payroll forms. Verify individual information; check for accuracy; obtain department authorization; submit to payroll.	Resolve discrepancies with supervisors and other fiscal personnel.
	Non-Exempt Staff (Support, Service, Voucher, Student, Temporary Staff) Weekly Payroll. May have limited signatory power in upper levels on some payrolls (subject to Institute Policies)	Not applicable	Distribute and Collect timecards or payroll sheets. Type some information into local databases.	Transfer information from timecards to payroll sheets (on weekly basis), verify signatures of supervisors, maintain internal database.	Resolve discrepancies with supervisors and other fiscal personnel.

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Each level incorporates the activities included in preceding levels. All duties listed are meant to be illustrative of possible activities associated with each function at various levels.

Classification Matrix

	Function	Lowest Level			Highest Level
	Research				
	Research	Not applicable	Gather/compile data in a logical order for inclusion in larger project supervised by Faculty/Staff. Check references. Assemble bibliography.	Analyze and summarize data under the supervision of administrator or faculty member.	At the request of supervisor, research area of specific interest using library, existing databases, or other Institute resources. May assign some portions of project to other support staff.
	Computer Skills				
	Database Management, Spreadsheet: *Filemaker, Microsoft Works, Rbase, Paradox, Dbase, some Mainframe databases. Lotus 1,2,3; Microsoft Excel, Supercalc, Multiplan, etc.*				
	Gather Information/ Data	Type data into database. Put information into existing spreadsheet.	Type data from standard sources or forms into existing database or spreadsheet. Verify data as necessary.	Interpret and Type data from a variety of sources. Download data/import data from other environments, translate, and add to database using standard routines.	Identify sources and/or documents for required data or information and type into database or spreadsheet. Import data from other environments, translate, and add to databases.
	Report Generation	Run reports on a predetermined schedule. Print copies of spreadsheets.	Prepare standard reports. Run standard queries. Print reports. Prepare and print reports using existing spreadsheets.	Design standard reports using existing databases including summaries.	Interpret requests for information, construct queries, design non-standard reports, sometimes using relational tables. In the case of spreadsheets, design more complicated reports using multiple windows or multiple linked spreadsheets

Each level incorporates the activities included in preceding levels. All duties listed are meant to be illustrative of possible activities associated with each function at various levels.

Function	Lowest Level			Highest Level
Database and Spreadsheet Design	NA	May create or assist with creation of simple databases using standard package. Design simple spreadsheets containing some basic calculations or formulas.	May create or assist with creation of larger single-file databases or simple relational databases. Design or assist in the design of more complicated spreadsheets with multiple parts/windows with calculations and formulas.	May create or assist in creation of, more complex databases; single files or relational files containing fields calculated from other data to meet specific functions. Design complicated spreadsheets to meet specific needs with macros, calculations, formulas, multiple windows, or linkages to other spreadsheets or applications.
Word Processing and Desktop Publishing: *Microsoft Word, Pagemaker, Wordperfect*				
		Type text into wordprocessing package using knowledge of basic program.	Use knowledge of wordprocessing application to format documents, design frequently used templates and/or form letters, etc.	Use knowledge of wordprocessing and desktop publishing applications to prepare documents for distribution and/or publication.
Supervision				
Supervision Required	Requires direct, specific supervision on most non-routine tasks. Receives direction from senior Support Staff and/or Staff Supervisor.	Requires direct supervision on most new assignments; more general supervision on established tasks, procedures etc. Receives direction from senior Support Staff and/or Staff Supervisor.	Routinely operates with only general supervision. Receives direction from senior Support Staff and/or Staff Supervisor.	Operates with considerable independence. Acts with initiative to establish new (or modify) office procedures. Helps establish general work standards; helps monitor work of other Support Staff against these standards. Receives direction from Staff Supervisor.

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Each level incorporates the activities included in preceding levels. All duties listed are meant to be illustrative of possible activities associated with each function at various levels.

Classification Matrix

	Function	Lowest Level			Highest Level

Level of Experience and Education Required

The indicated years of experience are intended as reasonable guidelines. Supervisors should use discretion to count applicable administrative experience acquired through non-traditional occupations and employment. The Institute has counted a college degree as the equivalent of one year of experience, and the completion of the first year of MIT experience as equivalent of one and a half years of experience.

	Years of Experience:	Less than one year	1	2.5	4.5
	Experience and Education	No specialized experience required. High School diploma or equivalent.	Experience will include some formal, or informal, courses to achieve basic skill levels. High School diploma or equivalent.	Experience likely to include one or more specific courses in job related *technical/computer skills* areas. High School diploma or equivalent.	Incumbent will typically have taken courses in specific job related *technical/computer skills* areas. High School diploma or equivalent.
	Technical Skills:	No special technical/computer skills required.	Basic level of *technical/computer skill*. Must have, or be willing to acquire routine knowledge/use of wordprocessing, spreadsheets, DBMS, etc. touch system, etc.	Should be highly practiced in one or more *technical/computer skills* area. i.e. typing, spreadsheets, DBMS, editing, data gathering, accounting, etc.	Should have comprehesive skills in one or more *technical/computer skills* areas. Likely to act as resource for others.
	General Skills:	Demonstrated ability to follow direction and learn required tasks.	Some familiarity with most routine office procedures.	General level of understanding about a number of office procedures, with detailed knowledge of one or more functional areas. May help to train others.	Wide-ranging knowledge of most office procedures with detailed, in-depth, expertise in one or more functional areas. Able to provide training of other staff.

Each level incorporates the activities included in preceding levels. All duties listed are meant to be illustrative of possible activities associated with each function at various levels.

POSITION STANDARDS

TITLE LIBRARY ASSISTANT III

General Classification Description:

Under general supervision, perform semi-routine library duties, in order to: assist in developing and maintaining the overall library collection or a special collection and assist in providing technical and/or public service. Requires knowledge of standard library routines and procedures and/or library collection. Under general direction, performs diversified work as assigned, requiring knowledge of related routines and procedures. Must be able to deal tactfully and effectively with library users.

Characteristic Duties and Responsibilities:

Perform any or all of the following, within one or more functional units of the library system, including: technical services/processing and public services.

1. Provide directional information and explain library policies and procedures to users of library collection.
2. Perform semi-routine aspects of filing, searching (manual and/or on-line), and technical services/processing.
3. Perform bookchecking duties.
4. Responsible for shelving and maintenance of the library's general book collection, or other special duties.
5. May monitor and revise the work of student assistants within functional area; train student assistants; assist when questions and problems arise.
6. Initiate routine correspondence with publishers and vendors or in answer to information questions.
7. Maintain records or compile statistics related to functional area or collection.
8. Assist users in the operation of special library equipment.
9. Sort and distribute incoming and outgoing library mail.
10. May be responsible for divisional or branch library during evening and weekend hours.
11. May represent functional unit on library committees.
12. Perform special assignments/projects as required.

These standards are intended to indicate the kinds of tasks and levels of work difficulty that will be required of positions that will be given this title and shall not be construed as declaring what the specific duties and responsibilities of any particular position shall be. It is not intended to limit or in any way modify the right of any supervisor to assign, direct and control the work of employees under his or her supervision. The use of a particular expression or illustration describing duties shall not be held to exclude other duties not mentioned that are of similar kind or level of difficulty.

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Characteristic Duties (continued)

13. May perform secretarial or other clerical duties as required.

Qualifications:

Education: High school graduate or equivalent is necessary.

Experience: Minimum of one year direct/related experience is necessary. Post high school education can count toward experience.

Skills: Typing skill may be required. Some knowledge of one or more foreign languages may be desirable.

POSITION STANDARDS

TITLE LIBRARY ASSISTANT IV

General Classification Description:

Under general supervision, plan and perform complex library duties in order to: assist in developing and maintaining the overall library collection or a special collection and assist in providing technical and/or public services. Requires considerable knowledge of specialized library routines and procedures and/or library collection. Initiative and judgment are required to carry out generally established procedures. Must be able to deal tactfully and effectively with library users.

Characteristic Duties and Responsibilities:

Perform any or all of the following, within one or more functional units of the library system, including: technical services/processing and public services:

1. Provide information and reference services to users of library collection.

2. Interpret library policies and procedures to library users, requiring judgment to resolve problems as necessary.

3. Perform complex aspects of filing, searching (manual and/or on-line), cataloguing (manual and/or on-line), and technical services processing.

4. May participate in the review, establishment or modification of specialized library procedures, to provide more efficient service within functional area of library system.

5. Answer inquiries from faculty, divisional and branch library personnel, academic and administrative departments to resolve problems occurring within functional area, or with a collection; coordinate work of unit with other units of library system.

6. Set priorities for own work due to pressures, deadlines, and volume at peak times.

7. May schedule, monitor and revise the work of other library and/or student assistants within functional area; may train new employees; assist when questions and problems arise.

8. Initiate routine correspondence with publishers and vendors or in answer to information.

9. Maintain records or compile statistics related to functional area or collection.

10. Assist users in the operation of special library equipment.

These standards are intended to indicate the kinds of tasks and levels of work difficulty that will be required of positions that will be given this title and shall not be construed as declaring what the specific duties and responsibilities of any particular position shall be. It is not intended to limit or in any way modify the right of any supervisor to assign, direct and control the work of employees under his or her supervision. The use of a particular expression or illustration describing duties shall not be held to exclude other duties not mentioned that are of similar kind or level of difficulty.

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Characteristic Duties (Continued):

11. Review library mail, separating out problem items that require further attention or correspondence.

12. May be responsible for divisional or branch library during evening and weekend hours.

13. May assume responsibility for functional unit(s), in absence of supervisor.

14. May represent functional unit on library committees.

15. Performs special assignments/projects as required.

16. May perform secretarial and clerical duties as required.

Qualifications:

Education: High school graduate or equivalent is necessary. One or two years of college may be preferred.

Experience: Minimum of 2.5 years direct/related experience is necessary. Post high school education can count toward experience.

Skills: Typing skill may be required. Reading knowledge of one or more languages may be required. Subject background, e.g. music, art history, or science, may be required.

POSITION STANDARDS

TITLE LIBRARY ASSISTANT V

General Classification Description:

Under minimal supervision, plan and perform complex library duties to assist in the development and maintenance of the overall library collection or a special collection and assist in providing technical and/or public services. Requires indepth knowledge of non-routine and specialized library practices or procedures and/or a library collection. Discretion, independent action and judgment are required regularly to analyze facts, make decisions, take or recommend action. Must be able to deal tactfully and effectively with library users.

Characteristic Duties and Responsiblities:

1. Schedule, coordinate, direct, monitor and revise the work of other library and/or student assistants within functional area. Train new employees. Assist when questions and problems arise. Assist in interviewing, selection and evaluation of other employees in same working group.

2. Assume responsibility for functional unit in absence of supervisor.

3. Answer inquiries and consult with faculty, divisional and branch library personnel, academic and administrative departments to resolve problems occuring within functional area, or with a collection. Coordinate work of unit with other units of library system.

4. Participate in the review, establishment, or modification of specialized library procedures to provide more efficient service within functional area of library system.

5. Set priorities for own work or work of unit, due to time pressures, deadlines, and volume at peak times.

Also perform any or all of the following, within one or more functional units of the library system, including: technical services/processing and public services.

6. Provide information and reference services to users of library collections.

7. Interpret library policies and procedures to library users, requiring judgment to resolve problems as necessary.

8. May perform complex aspects of filing, searching (manual and/or on-line), cataloguing (manual and/or on-line), and technical services/processing.

9. Initiate some non-routine correspondence about problems with publishers.

10. Maintain records or compile statistics related to functional area or collection. May analyze statistics and report summary and recommendations based on statistical trends, etc.

These standards are intended to indicate the kinds of tasks and levels of work difficulty that will be required of positions that will be given this title and shall not be construed as declaring what the specific duties and responsbilities of any particular position shall be. It is not intended to limit or in any way modify the right of any supervisor to assign, direct and control the work of employees under his or her supervision. The use of a particular expression or illustration describing duties shall not be held to exclude other duties not mentioned that are of similar kind or level of difficulty.

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Characteristic Duties (Continued):

11. Review library mail, separating out and resolving problem items.

12. Responsible for the operation and maintenance of special library equipment.

13. May be responsible for divisional or branch library during evening and weekend hours.

14. May represent functional unit on library committees.

15. Perform or direct special assignments/projects as required.

Qualifications:

Education: High school graduate or equivalent is necessary. One or two years of college may be preferred.

Experience: Minimum of 4.5 years direct/related experience is necessary. Post high school education can count toward experience.

Skills: Typing may be required. Reading knowledge of one or more foreign languages may be required. Subject background, e.g. music, art history or sciences, may be required.

Library Technician Series
General Observations of the Spec Development Team
April 1998

First off, the Spec Team realizes that we have positions and terminology represented in these documents that are UO-specific. Perhaps other OUS libraries have similar local terminology, and perhaps, not. In any case, we hope the concepts can be understood and transferable where appropriate. It was certainly not our intention to write the final report with only the University of Oregon in mind. Use this data as you see fit in future drafts.

In previous library technician series classification specifications, it was our observation that public services' tasks were not as well represented as they should have been. Additionally, we now have positions that did not exist five or ten years ago (such as those in the field of preservation). We tried to examine a broad cross-representation (public services, technical services, branch libraries) to arrive at a mixed sampling.

The issue of student assistants is a critical and constant one in libraries all over the United States. The fact that libraries rely heavily on their employment, particularly in light of other staff shortages due to budgetary concerns, means that more and more staff interact at some level with students. We have tried to differentiate these levels from basic monitoring to the full range of supervisory duties and responsibilities. It is no longer an option for managers to not delegate this oversight. There is simply no one else left to do the work. We would like this factor to be emphasized strongly in the next LT Series draft.

Customer service involves a level of complexity that ranges from providing basic informational/directional assistance, to providing actual reference service in specific subject area and/or specific formatted collections. "Several trends in staffing levels and responsibilities are likely to affect library service for the foreseeable future. Technology has helped to increase productivity by automating many routine tasks. At the same time, increased dependency on networked technology has demanded greater skills and abilities throughout the organization. The management of complex databases, integration of electronic resources, maintenance of numerous servers and public workstations, and the development of online services such as electronic reserves requires sophisticated problem-solving skills and teamwork" (from Library Program Review, 1998).

Technology has changed how we perform many functions in libraries. In many ways, the speed of information technology and transfer requires that we provide more information at a faster pace. User expectations and demands have increased dramatically. With additional levels of complexity added to our workflow, along with a greater volume of transactions, there are now more problems to resolve than ever before. A new layer of complexity has been added to the typical workflow, which increases the need for library technicians to constantly update their skills and routines before a new system is implemented locally. All technicians are now expected to be computer savvy.

Positions located in branches or in more self-contained units often require cross-training and overall knowledge of operations vs. specialization. This is difficult to reflect when distinguishing between levels. Just because a position has a narrow subject expertise quotient doesn't mean the overall knowledge required to do the job isn't very broad.

Position Analysis Survey

1. **General Library Knowledge.** This position requires that the employee has the following level of library knowledge:
   - ☐ Good general knowledge of library functions
   - ☐ Thorough general knowledge of library functions
   - ☐ Thorough knowledge of library functions and a clear understanding of the interrelationships among units

2. **Unit Knowledge.** This position requires that the employee has the following level of unit knowledge:
   - ☐ Knowledge of basic functions of unit
   - ☐ Clear understanding of basic functions of unit and may assist with some advanced functions
   - ☐ Thorough knowledge of basic and advanced unit functions

3. **Interactions.** This position requires that the employee interacts on a regular basis within the following framework:
   - A. **Within employee's own unit or department:**
     - 1. **Frequency:** ☐ Occasionally ☐ Frequently ☐ Routinely
     - 2. **Complexity:** ☐ Routine transactions, basic referrals, directional information ☐ More complex transactions with extensive referral knowledge and problem-solving required ☐ Complex transactions with problem-solving and decision-making authority required
   - B. **Within other library departments:**
     - 1. **Frequency:** ☐ Occasionally ☐ Frequently ☐ Routinely
     - 2. **Complexity:** ☐ Routine transactions, basic referrals, directional information ☐ More complex transactions with extensive referral knowledge and problem-solving required ☐ Complex transactions with problem-solving and decision-making authority required
   - C. **With campus departments or external agencies**
     - 1. **Frequency:** ☐ Occasionally ☐ Frequently ☐ Routinely
     - 2. **Complexity:** ☐ Routine transactions, basic referrals, directional information ☐ More complex transactions with extensive referral knowledge and problem-solving required ☐ Complex transactions with problem-solving and decision-making authority required
   - D. **With the general public (e.g. students, faculty, community patrons)**
     - 1. **Frequency:** ☐ Occasionally ☐ Frequently ☐ Routinely
     - 2. **Complexity:** ☐ Routine transactions, basic referrals, directional information ☐ More complex transactions with extensive referral knowledge and problem-solving required ☐ Complex transactions with problem-solving and decision-making authority required

4. **Public Contact.** Which best describes the employee's rate of public contact?
   - ☐ Occasionally assists the public
   - ☐ Frequently assists the public
   - ☐ Routinely provides reference services

5. **Supervision Received.**

A. How many other FTE (staff plus students) report to the same supervisor as this employee?

- ☐ 0-3
- ☐ 4-8
- ☐ 9+

B. Which best describes the amount of interaction between this employee and the supervisor?

- ☐ Works under close supervision
- ☐ Works under periodic supervision
- ☐ Works with minimal supervision

6. **Review of Work**

A. Which best describes the frequency with which the employee's work is reviewed by the supervisor?

- ☐ Routinely
- ☐ Occasionally
- ☐ Employee reviews own work

B. Which best describes the employee's ability to get the supervisor's help in resolving problems?

- ☐ Immediate assistance in problem-solving (Supervisor right at hand, for example)
- ☐ Periodic and/or on-demand assistance in problem solving (Supervisor has "office hours" or weekly meeting, checks in)
- ☐ Problem assistance available as required (Supervisor expects employee to identify and bring problems)

7. **Consequence of Error.** Which best describes the consequences of errors made by the employee, i.e., how "serious" might a normal error be? Consider how easy it is to identify errors, how easy to recover, and the extent to which others might be affected by that error.

- ☐ Limited consequences
- ☐ Moderate consequences
- ☐ High level consequences

8. **Leadership.** Which best describes the employee's relationship with other staff and with student assistants?

- ☐ May provide limited direction for student workers
- ☐ May assist in the supervision of student workers
- ☐ May assist in the supervision of LT1's, 2's and student workers

9. **Judgment/Responsibility/Authority.** Which best describes the employee's regular need to use independent judgment, and the extent of their defined responsibility?

A. Defined responsibility:

- ☐ Narrow
- ☐ Broader
- ☐ Very broad

B. Use of judgment:

- ☐ Limited judgment
- ☐ Routinely exercises independent judgment
- ☐ Routinely exercises independent judgment, responsibility and authority

10. **Degree or Description of Task Difficulty**

- ☐ Performs basic or standard functions
- ☐ Performs basic or standard and some advanced library functions
- ☐ Performs complex library functions

11. List five Library functions essential to this position.

	Function	% of Job	Complexity
1.	_____	___%	☐ Basic ☐ Advanced ☐ Complex
2.	_____	___%	☐ Basic ☐ Advanced ☐ Complex
3.	_____	___%	☐ Basic ☐ Advanced ☐ Complex
4.	_____	___%	☐ Basic ☐ Advanced ☐ Complex
5.	_____	___%	☐ Basic ☐ Advanced ☐ Complex

12. List non-Library specific knowledge or skills essential to this position.

	Function	% of Job	Complexity
1.	_____	___%	☐ Basic ☐ Advanced ☐ Complex
2.	_____	___%	☐ Basic ☐ Advanced ☐ Complex
3.	_____	___%	☐ Basic ☐ Advanced ☐ Complex
4.	_____	___%	☐ Basic ☐ Advanced ☐ Complex
5.	_____	___%	☐ Basic ☐ Advanced ☐ Complex

Distinguishing Features

Features	LT1	LT2	LT3
General Library Knowledge	Good general knowledge of library functions	Thorough general knowledge of library functions	Thorough knowledge of library functions and a clear understanding of the interrelationships among units
Unit Knowledge	Knowledge of basic functions of unit	Clear understanding of basic functions of unit and may assist with some advanced functions	Thorough knowldege of basic and advanced unit functions
Supervison Received	Works under close supervision Ratio: 1:0-3	Works under periodic supervision, Ratio: 1:4-8FTE	Works with limited supervision, Ratio: 1:8+
Review of Work	Routine review for accuracy, immediate assistance in problem-solving	Occassional review, periodic/on-demand assistance in problem solving	Self-monitoring and problem assistance available as required
Consequence of Error	Limited consequences	Moderate consequences	High level consequences
Leadership	May provide limited direction for student workers	May assist in the supervision of student workers	May assist in the supervision of LT1's, 2's and student workers
Judgment/Responsibility/Authority	Narrowly defined responsibility, may excercise limited judgment	More broadly defined responsibility and routinely excercises independent judgment	Routinely exercises independent judgment, responsibility and authority
Degree or Description of Task Difficulty	Performs basic or standard functions	Performs basic or standard and some advanced library functions	Performs complex library functions

LIBRARY TECHNICIAN 1 0300

GENERAL DESCRIPTION OF CLASS

The LIBRARY TECHNICIAN 1 performs basic technical duties and/or provides basic customer assistance in support of library services in an operational unit or section of a university library. Some positions in this class may monitor the work of students.

DISTINGUISHING FEATURES

This is the first level of a three-level series. At this level, employees have a general knowledge of available library services and provide routine information on the location or availability of material, resources, and services. Employees at this level receive regular direction from a higher level technician or librarian and perform basic tasks within well-established guidelines. At this level, employees have limited independent decision-making and limited responsibility for directing, coordinating, training, and scheduling work of lower level employees, student staff, and volunteers. The work requires a basic knowledge of library and unit operations, and review of work by a supervisor may become more general as job proficiency is obtained.

DUTIES AND RESPONSIBILITIES

Positions in this class perform varying combinations of duties as exemplified by the typical tasks listed below.

1. **Technical Operations.** Typical tasks: uses local, regional, and national automated databases to obtain or verify basic information regarding library materials, titles, author names, subject headings, item availability in other libraries, or to establish current status of library holdings; refers unsolved searches to higher level technician or librarian for further processing or decision. Barcodes, labels, and security-tapes books; forwards materials within the library; performs serials check-in; prepares books for shelving and returns to correct location; processes/routes mail; gathers periodicals for binding; processes maps for storage; discharges bindery shipments; claims depository materials; creates item records; performs basic physical evaluation of materials; pulls and routes materials to be bound; prints/distributes circulation notices; bills patrons via electronic integrated system; logs requests for reserve materials; performs photo documentation; maintains web pages; may perform simple book or periodical material repairs.

2. **Patron Services.** Typical tasks: uses basic knowledge of library organizational structure and services to provide patrons and employees with information on the location or availability of material, resources, and services; checks materials in/out; places holds/recalls on checked-out items; explains basic circulation policy; pages books from stacks; monitors security of library materials; refers complex patron problems and requests for circulation exceptions to higher level staff.

3. **Miscellaneous.** Typical tasks: may monitor, train, and oversee the work of lower level employees, students, and volunteers; may order office supplies; and pack, unpack, and/or move materials; some positions may process student payroll, produce general correspondence, perform minor repair/maintenance on library office equipment; participates in stack maintenance, including shelf-reading, floor pick-up, re-shelving, and cleaning.

RELATIONSHIPS WITH OTHERS

Employees in this class may have regular in-person or phone contact with library patrons to provide general information about unit or general library operations and services. Employees will have occasional to regular contact with staff or other units to expedite the processing of materials and information.

SUPERVISION RECEIVED

Employees in this class receive general supervision from a higher level technician, librarian, or unit supervisor, once proficiency is obtained. Assignments are made orally or in writing. Work is reviewed in progress or upon completion for accuracy, timeliness, and conformance to library policies, procedures, and standards.

GENERAL INFORMATION

Positions are located in university libraries throughout the Oregon University System. Such positions require working with a diverse patron population and may also involve significant physical activity (e.g., standing, walking, bending, stooping, reaching, and lifting) in the handling of library materials. Positions may require regular use of computer equipment and databases.

MINIMUM QUALIFICATIONS

Positions in this class require:
-training, coursework, or experience that demonstrates the ability to enter, update, and retrieve information from a database, **OR**
-one year of experience as a library aide or library student assistant, **OR**
-an equivalent combination of training, coursework, or experience.

LIBRARY TECHNICIAN 2 0301

GENERAL DESCRIPTION OF CLASS

The LIBRARY TECHNICIAN 2 uses thorough general knowledge of established library procedures to provide a wide variety of technical duties and/or customer assistance in support of library services in an operational unit or section of a university library. Employees in this class may oversee the work of lower level employees, students, and volunteers.

DISTINGUISHING FEATURES

This is the second level of a three-level series. It is distinguished from the Library Technician 1 by having public service experience and/or broad technical expertise in library procedures, and the routine exercise of independent judgement in the interpretation and application of rules, policies, and procedures. At this level employees determine methods and procedures used in completing assignments. This class is distinguished from the Library Technician 3 by the absence of broad independent decision-making and advanced/specialized technical and/or public service expertise in library procedures and services.

DUTIES AND RESPONSIBILITIES

Positions in this class perform varying combinations of duties as exemplified by the typical tasks listed below.

1. **Technical Operations.**. Typical tasks: searches various sources to identify books and materials for which purchase requests have been received, receives orders, verifies with invoice, and processes invoices for payment; resolves order identification discrepancies (e.g., title, author, publisher, edition, subject, description, etc.), makes or recommends corrections indicated; maintains routine correspondence with vendors regarding order status, billings, credits, replacement copies and claims; runs binding pull slips, creates check-in records for government documents, checks-in foreign language serials; reformats materials (e.g., scanning, microfilming, etc.); copy cataloging: search, match, review, check, correct, link bibliographic records, upgrade cataloging, perform authority work (name, series, uniform titles), provide additional access points (titles, corporate bodies, etc.), explain relationship between titles (serials); online catalog database maintenance and quality control, evaluating and correcting author and subject headings; selecting, editing, and deleting authority records; adding copies, volumes, locations; inventory withdrawal and reinstatement; refers unusual bibliographic problems and database maintenance questions to higher level technician or librarian; gift processing (e.g., sorting, checking on-line catalog, selecting, organizing by subject, interacting with donors); performs oversight of stack's maintenance in branches and smaller work units (e.g., assigns shelf-reading, plans shifts);creates web page scripts, tables, and/or

forms using established guidelines and templates.

2. **Patron Services.**. Typical tasks: uses knowledge of library structure, organization, and staff services to: provide patrons and employees with information on the location or availability of material, resources, and services; refers complex patron problems and information/exception requests to higher level staff or librarians; staffs circulation desks; take requests for service (e.g., interlibrary loans, rush cataloging requests, recalls); determines patron eligibility for services, creates and updates patron records, patron billing and fining; Interlibrary Loan lending (OCLC updating, correspondence, billing); arranges for and authorizes circulation exceptions to meet special needs of patrons; accepts and processes requests from faculty for items to be placed on reserve and maintains an electronic database of reserve materials; initiates faculty book orders for reserve; reviews and corrects data in patron records; uses a scanner and specialized software to place materials into the library's Electronic Reserve system, reserve and exam collection maintenance; physically searches for materials, coordinates consortial (i.e. Orbis) lending and borrowing.

3. **Miscellaneous.** Typical tasks: may provide training and oversee the work of lower-level employees, students and volunteers; operates personal computer systems, and on-line terminals to access local, regional or national data bases; codes or instructs others to encode information for entry into data bases (e.g., external/other vendor database); maintains knowledge of technical manuals governing the access to and manipulation of data base systems used in unit; maintains knowledge of current rules, regulations, and standards (e.g, Library of Congress and local, regional, and national cataloging rules) related to unit operations; may prepare and present statistical reports to supervisor or management. Provides weekend and evening building oversight and follows established guidelines during emergencies or unusual situations.

RELATIONSHIPS WITH OTHERS

Employees in this class may have regular in-person or phone contact with library patrons to provide general information and assistance, and resolve processing/location problems, often through interaction with technical and professional staff of other units. Employees may also have regular contact with publishers or vendors and with staff of other libraries.

SUPERVISION RECEIVED

Employees in this class receive periodic supervision from a higher level technician, librarian, or unit supervisor who assigns work orally and in writing, and reviews work upon occasion, as requested, or upon completion.

GENERAL INFORMATION

Positions are located in university libraries throughout the Oregon University System.

Such positions require working with a diverse patron population and may also involve significant physical activity (e.g., standing, walking, bending, stooping, reaching, and lifting). Positions may require regular use of computer equipment and databases.

MINIMUM QUALIFICATIONS

Position in this class require:
-one year of experience as a Library Technician, **OR**
-an equivalent combination of training, coursework, or experience.

LIBRARY TECHNICIAN 3 0302

GENERAL DESCRIPTION OF CLASS

The LIBRARY TECHNICIAN 3 uses advanced knowledge of library and information procedures, services, and resources to provide expertise and assistance with administrative tasks or unit operations for a unit, division, or branch of a university library. Employees in this class may oversee and assist with the supervision of the work of lower level employees and may supervise student assistants or volunteers.

DISTINGUISHING FEATURES

This is the third level of a three-level series of classes. It is distinguished from the lower levels by the requirement for advanced knowledge of print and electronic library and information resources, public service experience, and/or technical expertise in library procedures, resolution of problems referred from lower levels, and by a high degree of independent decision-making. At this level, assignments may include serving as unit operations coordinator or at a specialized public service desk (e.g., reference, circulation, branch libraries).

DUTIES AND RESPONSIBILITIES

Positions in this class perform varying combinations of duties as exemplified by the typical tasks listed below.

1. **Technical Operations.** Typical Tasks: Resolves complex, non-routine acquisition ordering, billing or credit problems with vendors/publishers, staff and selectors; performs backset receiving; resolves serial bibliographic record and government document check-in problems; sorts and prioritizes incoming materials; serials problem-solving (duplicates, non-receipts, payments, claims and other order problems); online catalog database maintenance and quality control; original and complex copy cataloging for review and completion; cataloging and classification (especially for unique collections such as electronic journals, non-book formats, manuscripts or rare materials); upgrades cataloging (call number assignment, subject analysis, additional access points); performs authority work; classifies maps and photographs; re-cataloging (e.g., changes location, searches, reviews, edits local records); collection maintenance (physical inventory and analysis of classifications); coordinates stacks maintenance and recommends changes and shifts to alleviate overcrowding; oversight and training of loose-leaf filers; manages web sites and creates and oversees maintenance of web pages; uses expertise in handling/processing special materials (art, maps, audiovisual, instructional materials, recordings, slides, etc.); may require specialized foreign language knowledge and skills in working with and processing foreign language materials.

2. **Patron Services.** Typical tasks: provides reference service in person, by phone, and/or e-mail with the guidance of librarians in general and/or specialized collections (e.g.; Map, Visual Resources; Music, etc.); receives referrals for information assistance and/or unresolved reference questions from lower-level staff or students; resolves non-routine and complex service problems and requests for policy exceptions referred by lower level staff; coordinates library-wide patron billing; reviews reserve materials for copyright compliance; troubleshoots interlibrary loan patron services.

3. **Miscellaneous.** Typical tasks: outreach (training, workshops and displays); coordinates work of lower level staff; maintains basic services and essential activities in absence of unit manager or professional staff (e.g., acts as assistant manager for functional work units such as Preservation, Circulation, Reserve, ILL); assembles, compiles, reviews, and reports unit operating data and statistics; reviews unit operating practices and procedures and recommends changes to increase accuracy or efficiency; monitors operational budgets for functional work units (e.g., student wages, supplies); provides direct liaison and coordination with other operational units to facilitate the timely processing of materials and information; provides direct assistance and performs special projects for unit manager/professional library staff as needed; inventories, maintains, and troubleshoots technical equipment and electronic resources; writes electronic resources documentation and provides resource user group training (e.g., the Internet, online catalog, bibliographic and full-text databases, etc.); may hire, train, schedule, assign, and evaluate student employees. May train, schedule and oversee the work of lower-level staff, students, and volunteers.

RELATIONSHIPS WITH OTHERS

Employees in this class may have regular in-person, phone, or e-mail contact with library patrons to provide information and/or reference assistance. Employees often have regular contact with technical and professional staff of other units to resolve problems and coordinate and expedite materials/information processing. The employee may have regular to frequent contact with publishers or vendors and with staff of other libraries.

SUPERVISION RECEIVED

Employees in this class receive limited supervision from a unit manager or librarian. Work is performed with a high degree of independence and is guided by consultation with professional staff and access to library manuals of policy, practice and procedure. The employee is further guided by technical resource materials.

GENERAL INFORMATION

Positions are located in university libraries throughout the Oregon University System. Such positions require working with a diverse patron population and may also involve

significant physical activity (e.g., standing, walking, bending, stooping, reaching, and lifting). Positions may require regular use of computer equipment and databases.

MINIMUM QUALIFICATIONS

Positions in this class require:
-three years of experience as a Library Technician, **OR**
-an equivalent combination of training, coursework, or experience.

SUMMARY REPORT OF THE LIBRARY REVIEW PROJECT

Beverley Dickinson

Linda McCann

June 1990

For Distribution To:
Library Management Committee
Library Advisory Committee
CUPE 1975

SUMMARY REPORT

LIBRARY REVIEW PROJECT 90

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Library Review Project

Background and Rationale

In the spring of 1987 Library Administration and the Personnel Office agreed to conduct a comprehensive review of the Library Assistant Job Group. The Library Review Project was prompted by a number of factors. First, it had been clear for some time that the Classification Specifications, which had been developed in 1971, required updating. In addition, the Union (C.U.P.E. Local 1975) thought that the recently implemented automated library information system affected most Library Assistant positions in one way or another. The Union wanted the Classification Specifications to reflect these recent developments and wanted to know whether or not the introduction of such a broadly used automated system affected the classification of Library Assistant positions. The Library and the Personnel Office thought that a review would now be timely since the last of the four modules of the automated system was scheduled for implementation in the spring of 1987.

Introduction

It was agreed that the goals of the project would be to: gather information on all jobs in the library and ensure that they are accurately described and correctly classified; and to update the classification specifications.

Job evaluation generally looks at the content and requirements of a job and at the contribution of levels of functions and responsibilities of a position to the organization. The University of Saskatchewan employs a Classification System which describes classes of positions and groups them according to similarity in the level of difficulty, responsibility, typical duties, and qualifications required for the job. Evaluation of positions is based in part on the information provided in an open-ended position description questionnaire (PDQ).

For the Library Review Project information would be gathered on a range of duties and responsibilities, including duties specific to the library. They would be categorized according to level of demand and complexity. It was felt that this would be aided by data collection using a more standardized instrument. This method of evaluation would lend itself to the comprehensive description and assessment of the diversity of library positions. It would provide the information required to update the specifications and to determine whether positions were correctly classified.

It was also agreed that Library staff would be involved as much as was possible in the review process. To this end, a Library Advisory Committee, with representatives from the Library, Management and the Union, would be struck. Group and individual meetings with Unit Heads and Library Assistants would be held at various stages of the review period. Mechanisms would be set up to keep the staff informed of the progress of the project and similarly the reviewers would be kept informed of staff issues and questions.

The Review

A. Preliminary Work

A proposal, developed in the spring of 1987, was followed by meetings between Library Administration and the Personnel Office, and by an outline of the phases of the project. All the phases were followed, although each took considerably longer to complete than was originally planned. The phases are outlined below.

1. Preliminary Phases

i) Advise Library staff by memorandum of the purpose of the review, of Review Committee membership and invite nominations for membership on a Library Advisory Committee (LAC).

ii) Select Advisory Committee members - included representation from Public Services. Management and CUPE -

iii) Advise Committee members and staff of Committee membership and Committee mandates, encourage staff to contact members with questions.

iv) Review Committee and Library Advisory Committee meet to review mandates, goals, objectives, questions and ideas exchanged.

v) Hire a Research Assistant (part time for one year).

vi) Review job evaluation literature, specifically as it pertains to job evaluation and review in Academic libraries.

vii) Research Assistant meets with Unit Heads and a representative sample of Library Assistants to gather information regarding the scope, functions, specific tasks, demands and responsibilities of Library Assistant positions.

viii) Based on meetings, feedback from LAC, literature review, organizational records, and current documentation, a draft questionnaire is designed.

ix) Library Assistants and CUPE representatives invited to meetings with Review Committee where questions, concerns, etc., can be discussed.

x) The Personnel Office, Library Personnel and CUPE President representative meet to clarify some areas of concern.

2. Pilot Test

Rationale

The purpose of the pilot was to test the degree to which the questionnaire could provide descriptive information regarding specific

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positions as well as the information necessary to determine differences in levels of functions and positions.

Sample

A representative sample of 33 Library Assistant positions, spanning all levels and Units, was selected for the pilot test.

Questionnaire

The Pilot Position Description Questionnaire consisted of two major sections: the first section was designed to gather information on job components (ie. judgement, supervision, contact, etc.). The second section listed library tasks in the following major categories: clerical, maintenance, physical handling, acquiring and processing, circulation, data base management, and administrative type duties. Also included was a section for employee, supervisor and Unit Head comments, as well as a response guide.

Procedure

The Questionnaire was distributed to the employees through their Unit Head. Employees, supervisors, and Unit Heads were encouraged to discuss responses to questions prior to completion of the Questionnaire. The Research Assistant conducted meetings with five of the test participants to solicit further feedback.

Results

The results demonstrated that levels of components and items in the Position Description Questionnaire corresponded to the Library Assistant levels. For example, the findings showed that positions at the higher levels required more library skills (such as cataloguing), specialized contact with the public, second language function, mental effort and supervisory responsibilities. These findings, as well as the general feedback, provided the information necessary for the construction of the final Questionnaire.

B. Methodology

Positions Reviewed

One hundred and twenty-two completed questionnaires, spanning 18 Library Units, were returned. The breakdown by Unit and Classification Level (at the time of review) is shown in Table I. Of the 122 positions, 109 were permanent, 10 seasonal and 3 term.

Questionnaire

The Position Description Questionnaire gathered the following information: Summary of Position; Job Demands (Judgement and Effort); Special Skills and Responsibilities - Contact, Type of and Function on Automated Systems, Library Skills (cataloguing, searching, working with special materials), Property, and Supervision Provided; Library Tasks (Clerical, Maintenance, Physical Handling, Acquiring and Processing, Data-Base Management, and Administrative Type Duties); Employee Comments Section; Supervisor Comments Section; and Unit Head Comments. For each of these sections, room was provided for employees to list additional responsibilities and tasks. A response guide was also included.

Table I

Reviewed Positions by Department

Department	Grade LA I	LA II	LA III	LA IV	LA V	Row Total Percent
Administration	1					1 .8
Bib. Control		1		5	2	8 6.6
Cataloguing				6	2	8 6.6
Circulation	5	9		3	1	18 14.8
Collection Dev.		3		1	1	5 4.1
Education	4	4		2		10 8.2
Engineering	1	2			1	4 3.3
Geo/Phy	1	1		1		3 2.5
Government Pub.	1			3	1	5 4.1
Health Sciences	1	1	1	2	1	6 4.9
Law	2	2		2		6 4.9
Order	7	2	2	2	1	14 11.5
Production	6	5		5	2	18 14.8
Reference	3	1		1	2	7 5.7
Special Coll.		1			1	2 1.6
Systems					1	1 .8
Thorvaldson		2		1		3 2.5
Veterinary Med.	1	1		1		3 2.5
Column Total	33 27.0	35 28.7	3 2.5	35 28.7	16 13.1	122 100.0

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Procedure

The Questionnaire was delivered by the Research Assistant to each Unit. At that time, he met with the Unit Head to encourage them to facilitate discussions between employees, supervisors, and the Head, as they each completed their particular sections of the Questionnaire. Soon thereafter, the Research Assistant followed up with a telephone call to discuss any problems or concerns they may have had.

Analyses

Analyses were conducted on case (position) scores, transformed scores and group means scores from the original data set. Scores and summary statistics were calculated for each item, each component (listed above), and a summed score for each of the 122 positions and for each class level using SPSS-X Report. Supervisors' responses were coded and summarized in a similar manner. Frequencies and Crosstabs were conducted for each item, as well as for components including judgement, effort, contact, work with automated systems, cataloguing rules and functions, property, and a summed total.

Contribution of items and components to level was tested with Pearson correlations. The contribution of these components to the summed score was tested using multiple regression analyses. Internal consistency of the components was tested by reliability analyses. T-tests were conducted on mean scores between levels for each component and item.

Results

The analyses indicated that five distinct levels of Library Assistants are operative. First, as Figure 1 visually demonstrates, there was a linear progression of scores. Significant relationships between classification level and score were found for the summed score, judgement, the supervision provided components score, and for library related skills. The t-tests showed that the means for the total score and for specific components differed significantly between levels. Analyses conducted on a revised data set (based on recommendations) yielded high correlations on all components and the summed score, suggesting a stronger linear trend across all levels.

The analyses and findings show that the questionnaires provided the information necessary to update the Classification Specifications. That is, the crosstabs (grade by variable) and supporting correlations (grade by variable), and tests between means demonstrated that levels of various components or specific items were appropriate for specific grade levels. The regression analyses confirmed the contribution of judgement, working with automated systems, contact and provision of supervision, to the overall scores. These findings are reflected in the Classification Level Definition section of the Classification Specifications (see Classification Specifications). In addition, the task list provided listings which were used in the development of the Characteristic Duties and Responsibilities section of the Classification Specifications. Supervisors provided specific information for the desirable qualifications for each level of classification.

The analyses also showed that specific positions did not appear to fit within their current classification level. If scores for a position fell outside of the means over a number of items and across various analyses, the position was slated for further review. In addition, any time there

were discrepancies between an employee's responses and the supervisor's comments, the position was targeted for further information gathering.

In all, the data suggested that it was necessary to gather further information on 21 of the 122 positions. These positions were in Bibliographic Control, Circulation, Collection Development, Education, Health Sciences, Law, Order, Production, Reference and Thorvaldson. It should be noted that for some of these positions it was only necessary to clarify some aspects of the job with the Unit Head.

C. Interview Stage

Once the positions were identified, interviews with Heads were scheduled. It should be noted that all Unit Heads were interviewed, whether or not positions in their respective Units were slated for further review.

For the interview, most Unit Heads were asked to provide an organizational chart, and were asked which, if any, of the positions in their Unit they felt might not be correctly classified. The duties and responsibilities of each position were discussed with the Unit Head, with specific information being gathered on the identified positions.

Following the interviews with the Unit Heads, further information was gathered based on interviews with Library Assistants from the Order, Reference, Health Sciences and Production Units.

D. Conclusion

The analyses of the questionnaire data and the information gathered in the subsequent interviews supported the continuation of five levels of Library Assistant positions. The Classification Level Definition, Characteristic Duties and Responsibilities and Desirable Qualifications for each level were updated primarily on the basis of information provided in the questionnaires, interviews and LAC Meetings.

Evaluation recommendations for each position were based on questionnaire information and were substantiated by interviews with Unit Heads and, in some cases, incumbents.

A summary of recommendations, along with a rationale for any changes, is provided in the Recommendations Section of this report. The Classification Specifications are in the following section. Appendix A overviews frequently raised issues, concerns, and comments.

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EVALUATION REPORT

Definition of Terms Used

No Change -indicates the content of the position to be within the range of duties and responsibilities that could be expected at the current classification level of the position.

No Change -on a previous temporary upgrading - indicates no change from last review, that is the position will be reposted at the original classification level of one level junior when vacated.

R.B.P. -review before posting - indicates changes may have occurred, either organizationally or in the position. The position will be reviewed before posting to ensure it is properly classified.

R.B.P. -on a previous temporary upgrading - indicates the position will be reviewed with the Head when vacated to update job content information (could be reposted at the same level or reposted at the original level).

Red-circle -indicates presently overclassified for the level of duties assigned. When the position is vacated it will be reposted at the appropriate level. In the interim, the classification of the incumbent does not change, and they continue to receive compensation relative to their current level.

Upgrade (Perm) -indicates the duties and responsibilities as previously reviewed are now considered to be a permanent requirement. Therefore the position status moves from temporary upgrade to permanent upgrade.

Upgrade (Temp) -indicates the position will be upgraded by one level retroactive to January 1, 1989, and for as long as the current incumbent remains in the position. Temporary upgradings occur when there are sufficient higher level duties and/or responsibilities to upgrade, but when it cannot be determined the changes are of a permanent nature. Upon vacancy, the situation may again be reviewed with the Head.

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LIBRARY ASSISTANT I
Class No. 500

I. Classification Level Definition

Employees in this class perform routine library assistant work within well established policies and procedures. Initially they work under close supervision with detailed instruction, but with experience, they use judgement in their work and may set their own priorities with only occasional referral to supervisors. Tasks may be varied and may involve some element of detail and/or pressure. Consequence of error in these positions generally involves minimal loss which can be self-corrected. Contact with staff and students is for the provision of basic services and requires the exercise of common courtesy. Generally employees in this class report to a library Assistant of higher classification.

Supervisory Responsibility

May provide instructions to Student Assistants.

II. Characteristic Duties and Responsibilities

1. Perform routine circulation functions such as charge and discharge as well as technical functions such as creating/updating patron records, fine updates, processing holds, recalls, ILL requests, etc.. Provide routine patron assistance.

2. Search manually or by using the automated system.

3. Prepare and file special materials, maintain Kardex files, etc..

4. Maintain stacks, shelf read, shelve, retrieve items, etc..

5. Perform clerical functions such as mail distribution, filing, photocopying, reception, typing, data entry, accounts payable and receivable, monitoring and delivering of supplies, basic record keeping, receipt, recording and/or processing materials, etc..

6. Prepare materials for circulation and/or bindery by physically preparing materials, checking accuracy of description and completeness, completing and processing forms, etc..

7. Operate and provide routine maintenance to a variety of basic office and/or library equipment.

LIBRARY ASSISTANT I
Class No. 500

III. Desirable Qualifications

Education and Training

Grade 12. Library Technician Certificate preferred.

Experience

Previous library experience not required.

Typical Skills and Abilities

Ability to meet and deal effectively with the public at the appropriate level of service.
Typing skills.
Ability to do light or heavy lifting.

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LIBRARY ASSISTANT II
Class No. 502

I. Classification Level Definition

Employees in this class perform a wide variety of library routines using standard practices within generally well defined guidelines. Their work is differentiated from that of junior Library Assistants by the level of knowledge required, the latitude for decision making, and in some cases, the responsibility to oversee the work of others. Work, which may involve an element of trouble shooting and problem solving, involves moderate detail and pressure. Errors can be self-corrected or may involve consultation, with the consequence occasionally involving moderate replaceable loss. In their contact with faculty, students, and others, employees are required to provide guidance, explain procedure, and provide a broad range of assistance. Typically employees in this class are supervised by a Library Assistant of higher classification.

Supervisory Responsibility

May train and oversee the work of Student Assistants or Library Assistant I's.

II. Characteristic Duties and Responsibilities

1. Perform routine circulation functions as well as a wide range of technical functions, such as creating skeletal records, linking bibliographic records, etc.. Provide patron assistance including fines processing and basic assistance in using local library resources.

2. Perform searching duties including, for example, pre-order searching, bibliographic searching, etc., using a variety of sources and requiring the application of basic cataloguing rules.

3. Check, edit and correct, a variety of routine or special reports, library materials, and/or documents.

4. May be responsible for the provision of various services including, for example, ILL lending or borrowing, campus telex, etc., ensuring appropriate billing and accounting functions are accurate and complete.

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LIBRARY ASSISTANT II
Class No. 502

III. Desirable Qualifications

Education and Training

Grade 12 plus a Library Technician Certificate or other post secondary education related to the position assignment.

Experience

At least two years of related experience including a familiarity with library tools, policies and procedures, and automated library information systems.

Typical Skills and Abilities

Demonstrated ability to meet and deal effectively with the public at the appropriate level of service.
Demonstrated ability to work independently and to organize one's work.
Typing skills.
Demonstrated ability to cope with a diverse set of tasks in a busy environment.
Ability to do light or heavy lifting.

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LIBRARY ASSISTANT III
Class No. 504

I. Classification Level Definition

Employees in this class initially follow standard practices and procedures but with experience in the job they choose methods to set goals and objectives where lack of precedent occurs. Their work is differentiated from that of junior Library Assistants by the level of problem solving and/or trouble shooting involved, by the latitude for independent action and decision making, and by the level of responsibility and/or complexity involved. Tasks usually involve a moderate to high level of detail or pressure. Errors can be self-corrected or may involve others, with the consequence involving moderate replaceable loss or occasionally significant replaceable loss. Contact with faculty, staff, and others, requires employees to provide guidance, explain procedure, and provide specialized service. Employees in this class work quite independently under the general guidance of a Library Assistant of higher classification or Librarian.

Supervisory Responsibility

Can be expected to train, assign and evaluate the work of a small group of junior Library Assistants and/or casual staff.

II. Characteristic Duties and Responsibilities

1. When providing circulation services, perform a full range of duties, including providing information assistance of moderate complexity.

2. Can be expected to apply cataloguing rules for searching and providing main entry information. May be required to search standard source documents and other source documents, including routine ILL verification.

3. Provide full range of service for both ILL lending and borrowing.

4. Work with a variety of data bases, records and files, for information processing. Maintain, assess, and initiate changes as required.

5. May have considerable financial responsibility, including monitoring budgets, maintaining ledgers, sorting/submitting accounts and claims, billing, collection and depositing of funds, etc..

6. Verify orders, estimate prices, assign and communicate with vendors, organize and process invoices for payment.

7. Initiate and conduct original correspondence requiring an in depth knowledge of the Unit's policies, procedures, and services.

III. Desirable Qualifications

Education and Training

Grade 12 plus a Library Technician Certificate or University education.

Experience

Several years of relevant library experience including familiarity with automated library information systems.

Typical Skills and Abilities

Demonstrated ability to meet and deal effectively with the public at the appropriate level of service.
Demonstrated ability to priorize, organize work, and to work to deadlines.
Ability to effectively supervise others.
Effective writing skills.
Typing skills.
Bookkeeping and/or accounting skills.

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LIBRARY ASSISTANT IV
Class No. 508

I. Classification Level Definition

Employees in this class use independence in choosing methods to achieve defined goals and objectives with consultation where lack of precedent occurs. Their work is differentiated from that of junior Library Assistants by the level of knowledge required, complexity and decision making, supervisory responsibility, or some combination of these factors. Tasks and responsibilities often involve significant levels of detail or pressure. Correction of errors often involves consultation with others, both within and outside of the Unit or Library, where the consequence of error usually involves significant replaceable loss. Contact with faculty, staff, students and others, is frequent and requires the provision of specialized service and/or effective problem solving. Employees in this class primarily work under the general supervision of a Librarian.

Supervisory Responsibility

Typically, these are supervisory positions, where incumbents are involved in the selection, training, delegating, evaluating, and guidance of junior Library Assistants and casual employees.

II. Characteristic Duties and Responsibilities

1. Supervise the operation of a circulation desk handling difficult technical service and public service problems as they arise. May also include the supervision of large reserve collections.

2. Provide reference service including planning library orientation.

3. Perform copy cataloguing, editing of LC and Canadiana Marc records, preparing of authority records, and catalogue maintenance.

4. Perform searching duties of considerable complexity requiring extensive use of cataloguing rules including, for example, pre-catalogue searching, bibliographic searching and verification of monographs and serials, non-routine ILL verification, etc..

5. In a centralized Unit supervise the ordering, receiving and/or accounts payable function, by overseeing staff and handling non-routine problems.

6. Maintain data bases, create, edit, and delete records following established procedures including, for example, serial holdings and bibliographic record databases.

7. Participate in a variety of administrative duties such as reviewing, developing and implementing internal procedures, preparing and revising manuals, developing and grooming data bases to accommodate information processing, preparing reports, etc..

III. Desirable Qualifications

Education and Training

Grade 12 plus a University degree relating to the position assignment.

Experience

Three or more years of related library experience including a familiarity with automated library information systems. Some positions may require a familiarity with particular library functions such as the book and/or serials trade.

Typical Skills and Abilities

Demonstrated ability to meet and deal effectively with the public at the appropriate level of service.
Demonstrated ability to supervise.
Demonstrated ability to organize work, set priorities, and to work under pressure.
Good analytical and problem solving skills.
Effective written and verbal communication skills.
Typing skills.

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LIBRARY ASSISTANT V
Class No. 510

I. Classification Level Definition

Employees in this class use independence in establishing priorities and procedures for their immediate area. Their work is differentiated from Library Assistants of other classifications by the level of knowledge required, the latitude for decision making, the level of complexity, and the responsibility to supervise others. Their work regularly involves a significant level of pressure, detail, and problem solving. Consequence of error generally involves significant replaceable loss and may involve permanent unrecoverable loss. Contact with individuals from the University community and the public plays a vital role in their work and the work of the Unit. Employees in this class work under the general direction of the Unit Head.

Supervisory Responsibility

Typically employees in this class supervise senior level Library Assistant and/or large groups of Library Assistants. They are involved in hiring recommendations for support staff, and are responsible for the training, delegating, evaluating, and guidance of staff under their supervision.

II. Characteristic Duties and Responsibilities

1. Supervise a large circulation area which involves significant responsibilities for large numbers of staff and problem solving in all areas.

2. Provide specialized reference assistance to the University community and the public including in-depth instruction in the use of local electronic databases, detailed library orientation, etc..

3. Perform a full range of cataloguing functions including, for example, providing main entry information, creating and editing of catalogue records, original cataloguing with restricted classification responsibilities, etc..

4. Assist in collection development and maintenance including, for example, organizing special collections, participating in selection of materials for acquisition or weeding, etc..

5. Coordinate special projects which involve considerable complexity and supervisory responsibility.

6. Perform a range of administrative duties such as contributing to policy decisions, preparing and administering budgets, initiating correspondence, preparing manuals and reports, developing work methods, and handling matters during brief absences of a Unit Head.

III. Desirable Qualifications

Education and Training

Grade 12 plus a University Degree with subject specialization.

Experience

Four or more years of relevant library experience including previous cataloguing or bibliographic searching experience in specific areas, and a familiarity with automated library information systems.

Previous supervisory experience required for those positions involving the supervision of others.

Typical Skills and Abilities

Demonstrated ability to meet and deal effectively with the public at the appropriate level of service.
Superior analytical and problem solving abilities.
Demonstrated ability to work independently and to organize work under considerable pressure.
Excellent verbal and written communication skills.
Typing skills.

SPECIFICATIONS FOR STATE-CLASSIFIED LIBRARY EMPLOYEES

INTRODUCTION

The University Library currently employs most state-classified employees for positions in two grade levels that no longer accurately reflect the range of library duties. The result has been that most library employees have been classified either in a clerical grade (4) or a library assistant grade (8), with a few positions at the intervening grade levels. Employees in the lower level positions, therefore, have limited opportunities for promotion in the Library. They are able to apply for a higher level position only when a rare vacancy occurs; the competition for the grade eight positions often has been intense.

At present, most library positions at grades four, five, and six are classified in the Office Services series. Other positions in the Library include Library Assistant, Program Support Technician, and some positions in the secretarial series. The Library also hires employees in the Fiscal Technician and Programmer series, but these positions are not reviewed here.

In April 1992 the Task Force on Specifications of Classified Library Employees was appointed to address the problem of limited library grade levels. The charge was to define gradations of responsibilities that would be appropriately classified as grades four, five, six, seven, and eight. After much work, and reviews at all levels, the report was approved by the Administrative Council. Now, as positions become vacant in the Library, they are reviewed, as necessary, and reallocated to the appropriate grade levels based on the specifications for library positions devised by the Task Force. We also will review filled positions at the request of supervisors who have compared the job descriptions with the task lists and identified those positions as being classified lower than they should be.

Presented in this report are sets of specifications for jobs of state-classified employees in library grades four through eight. Included for each grade are a statement of "class concept/ function," which describes the general requirements and responsibilities of the grade level, and a "task list," which gives examples of typical tasks performed by employees in this grade. Also included is a list of general KSA's (knowledge, skills, and abilities) which are requirements for most state-classified library positions.

The guidelines assume that state-classified employees who hold a position at one grade would be able to and also might be required to perform tasks of a lower grade, and further, that employees might also be able and required to perform some of the tasks of a higher grade. A position is classified at a particular grade level because most (more than 50%) of the time is spent on tasks listed for that grade.

In general, the complexity of responsibilities increases from one grade to the next. The aspects of a position that influence the determination of the grade level are:

the scope of the requirements and responsibilities;
the nature of the responsibilities--routine or complex;
the difficulty of the tasks identified;
the level of independence vs. the level of supervision required;
the decision-making requirements;
the level of problem-solving involved;
the degree of specialization; and,
the use of judgment in applying policies and procedures.

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The judgment of the supervisor is very important because he or she must evaluate the position in light of these criteria and recommend the most appropriate grade level for the tasks to be accomplished. Supervisors must review positions relative to other positions and must allow for flexibility in assigning tasks.

All job descriptions are written to support the Library's goals. Although creativity and initiative are encouraged in all positions, higher levels of innovation and independence are expected in the higher grades. In some areas of the Library, where a few employees must carry out a broad range of activities, employees are cross-trained to help out when needed. In this case, as in all cases, the job classifications are based on the level of the tasks that require the largest percentage of time in the job. A position with more task variety does not necessarily warrant a higher grade level. Fewer tasks in a job may mean that the tasks are more complex.

Several major areas that need clarification have been discussed at length by the Task Force. These areas are supervision, computer skills, language skills, and subject expertise, and the secretarial series.

Supervision

The Task Force uses the word "supervision" to mean hiring, training, evaluating, and disciplining students and staff. For positions that require one or more of these elements, but not all, the task list specifies those required in the grade level. Normally, the number of students or employees supervised is not correlated with the grade level of the positions.

Computer Skills

Because of the increased use of automation and technology in the Library, all library employees are expected to have some computer skills. At the lower grades, the skills required include basic keyboarding and word processing skills. The level of computer skill necessary to perform a job generally increases with the grade level. There are some positions in the higher grades, however, that require more complex or specialized skills than other positions in the same grade.

Language and Subject Expertise

Some higher level positions require a specific language, general bibliographic language skills, or a specialized subject background. This requirement does not in itself raise the grade level of the position. The position is classified based on the tasks performed and the skills required to perform the tasks.

Secretarial Series

The Task Force reviewed positions classified in the Secretarial series. We also met with the departmental secretaries to discuss their major job responsibilities. Some secretarial duties are included in the task lists, but most are not. Some departmental secretaries are classified in the Office Services series rather than the Secretarial series. The Task Force intends to make separate recommendations regarding these positions, especially with regard to making them more consistent within their classifications.

KSAs, EDUCATION, AND EXPERIENCE COMMON TO LIBRARY POSITIONS

KNOWLEDGE/SKILLS/ABILITY:

*Ability to maintain good working relationships
*Ability to communicate effectively [in writing or orally]
*Ability to deal courteously and effectively with the public
*Ability to resolve [simple, complex] problems
*Ability to cope with a complex system of rules and procedures
*Ability to plan and execute tasks [or projects]
*Ability to work accurately with attention to detail
*Ability to analyze and organize work procedures
*Ability to organize time and work assignments effectively
*Ability to cope with fluctuating workloads
*Ability to adapt to changes in workflow and procedures
*Ability to instruct classes and other groups
*Ability to work independently
*Ability to [hire, train, evaluate, schedule and/or supervise] staff
*Ability to work with a variety of foreign languages
*Knowledge [or skill] of [or in] [language, subject specialty, electronic information services, etc.]

*Knowledge of [basic keyboarding, word processing, computer languages and/or other computer skills]

*Ability to interpret and work with bibliographic information
*Manual dexterity [or physical stamina] sufficient to perform [task]
*Ability to maintain confidentiality

EDUCATION OR TRAINING:

*Bachelor's degree or equivalent experience [Grades 7-8]
*High school degree or equivalent experience [Grades 4-6]

LEVEL AND TYPE OF EXPERIENCE:

*Library experience in [specialized area] preferred
*Supervisory experience preferred
*Experience in [or with] [specialized area] preferred

GRADE 4: OFFICES SERVICES ASSISTANT (LIBRARY)

CLASS CONCEPT/FUNCTION STATEMENT: The Office Services Assistant (Library) class emphasizes routine program or operational support. The work is of limited scope and difficulty and requires an ability to follow directions. Works independently within established guidelines and under general supervision. Duties may include: routine searching; modification of computerized databases requiring basic computer skills; routine circulation services and stacks maintenance, including inventory; routine office services; and, training and directing the work of a limited number of student assistants.

TASK LIST:

carries out routine check-ins and/or receipts of library material and equipment, including the creation of manuscripts accession records
conducts simple electronic searches
adds routine holdings
circulates materials
receives/distributes/transmits mail, materials, fines, payroll checks, and other monies
carries out simple computer use and maintenance, including data entry, Email, basic word processing
maintains stacks and searches for missing items
shelves, moves, and shifts materials
files correspondence, maps, documents, preservation records, etc.
answers telephone, greets visitors, answers directional questions, and makes referrals
makes routine changes and corrections to VIRGO records
orders and maintains stocks of supplies
creates item records
explains department policies and procedures to clients, and enforces them when necessary
performs microfilming and/or photocopying
processes materials for binding and checks materials on return from bindery
types call number labels, and affixes them and other labels to materials
trains and/or directs the work of student assistants in routine duties
processes routine borrowing/lending requests
opens-closes library, including equipment power-up or -down
processes recalls and holds, including client notification
makes minor book repairs
maintains bulletin boards and prepares simple library displays
reviews materials received in branches to identify problems
assists users in use of equipment such as microform readers, copy machines, etc.
carries out routine inventories
obtains reserve lists, collects items, and maintains records
arranges for routine facilities maintenance
creates and updates client records, including routine Bursar referrals
maintains and troubleshoots problems with equipment including copy machines, VIRGO terminals, change machines, etc.
empties book deposit boxes

GRADE 5: OFFICE SERVICES SPECIALIST (LIBRARY)
(Greater variety of tasks, more complexity)

CLASS CONCEPT/FUNCTION STATEMENT: The Office Services Specialist (Library) class emphasizes more difficult or complex program or operational support. The work requires more advanced clerical and computer skills, including sophisticated word processing, and often involves problem solving. Duties may include: complex searching, modifying, or creating automated records, as well as routine computer maintenance; providing information services of a routine nature; solving circulation problems; ordering or receiving library materials; more complex office services; and, training and supervising staff. Functions with limited independence under general supervision and within established guidelines.

TASK LIST:

carries out more complex searching for bibliographic information, especially for materials in foreign languages, special formats, or rare materials
carries out complex check-in and receipt of library materials, including routine correspondence with vendors and exchange partners, and solves problems
processes claims, including the initiation of replacement orders
adds complex holdings and item records
updates records for lost, withdrawn, and transfered items, and routes materials
undertakes more complex use and maintenance of computers, including manipulation of data, sophisticated word processing
selects and downloads bibliographic records with material in hand
gathers and organizes data for statistical reports
carries out routine preservation searching
prepares materials to be sent to Preservation/Binding Unit by establishing binding patterns and updating records
processes borrowing/lending requests of greater complexity, including rush-patron requests
answers reference questions of a routine nature, and makes referrals
trains and supervises staff in the performance of routine duties
monitors fire alarms systems, the evacuation of the building, and coordinates action on emergencies or incidents
solves holds-recalls problems
creates provisional records with material in hand.

GRADE 6: PROGRAM SUPPORT TECHNICIAN (LIBRARY)
(Specialized)

CLASS CONCEPT/FUNCTION STATEMENT: The Program Support Technician (Li-brary) class emphasizes work of a specialized nature or a variety of detailed tasks. The work is of moderate difficulty and complexity requiring the exercise of independent judgment in applying policies, procedures, and/or technical knowledge, and problem solving. Duties may include: routine cataloging; training and evaluating staff; and simple programming. Functions independently, receiving general direction from a paraprofessional or higher.

TASK LIST:

answers reference questions requiring knowledge of resources specific to a unit, and makes referrals
solves difficult problems re lost, withdrawn, and transferred items for a service point
performs simple computer programming including DOS batch files, command language macros, etc.
troubleshoots routine hardware and software problems
carries out complex inventories and solves problems
develops and organizes information files
checks authority records (VIRGO, OCLC) to identify headings
performs routine copy cataloging from LC records
performs thesis-dissertation descriptive cataloging
troubleshoots problems between the Library and University administrative units
solves complex item record problems
changes patron records and processes and reconciles delinquent accounts resulting from circulation transactions for all library locations.
selects and downloads bibliographic records without material in hand
creates bibliographic records in VIRGO with the material in hand for acquisitions purposes
runs SAS programs making limited alterations as necessary
reviews and updates order information
resolves complex invoice/receipt problems with vendors, Business Services staff, and materials selectors

GRADE 7: PROGRAM SUPPORT TECHNICIAN, SENIOR (LIBRARY)
(Considerable difficulty)

CLASS CONCEPT/FUNCTION STATEMENT: The Program Support Technician, Senior (Library) class emphasizes work of considerable difficulty including duties of a paraprofessional nature. Performs complex technical, public service, and/or administrative duties requiring a moderate level of decision-making, judgment, and independence. Duties include: more complex cataloging; providing access to special materials or formats; reference assistance, including user orientation; complex bibliographic research; resolution of complex or difficult problems with system-wide implications; and, advanced computer use. Functions independently, receiving general supervision from a paraprofessional or higher.

TASK LIST:

supervises a library function within a unit
conducts very complex searching of electronic and print sources with differing search protocols and strategies
performs more complex cataloging
coordinates actions for the library system regarding lost, withdrawn, and transferred items, including problem solving
gives library orientation tours and presentations
prepares basic guides and indexes to collections
installs computer programs and troubleshoots when advanced computer skills are required
resolves complex order, pay, and receipt problems with vendors, including closing records
conducts staff training workshops
drafts and makes recommendations about policies and procedures for a library service or function
maintains bill and fine records by updating patron records on ISIS (UVa's Integrated Student Information System) and the Library/Bursar Referral interface. Works directly with Bursar in this effort.
creates bibliographic records in VIRGO without material in hand for acquisitions purposes

GRADE 8: LIBRARY ASSISTANT
(Specialized or administrative work of a limited professional level)

CLASS CONCEPT/FUNCTION STATEMENT: The Library Assistant class emphasizes paraprofessional work of considerable difficulty in specialized and administrative duties including some of a limited professional nature. Performs advanced technical, public service, and administrative duties requiring a high level of decision-making, judgment, and independence. Duties may include: managing a library branch or service; advanced cataloging; full reference service including user instruction; high-level bibliographic research, verification, or problem solving; arbitration of disputes with clients regarding policies; and, the use of automated systems to analyze and interpret data. Functions independently, receiving general supervision from a Library faculty member.

TASK LIST:

manages a library branch or service with a broad range of responsibilities
acts as liaison between a branch or service and academic departments in support of academic programs and research
provides reference service requiring comprehensive knowledge of research strategies, resources, and services
recommends the selection/deselection of materials
sorts, arranges, and describes collections
evaluates the physical condition of special collections materials to be copied, and selects the safest method of copying
maintains records of storage space and stacks, and plans and executes moves of material to make optimum use of space
arbitrates disputes with clients regarding policies
writes SAS and comparable programs
performs original or advanced cataloging
establishes authority headings and interprets and resolves cataloging authority conflicts
analyses and interprets data to support decision making
conducts user instruction sessions based on comprehensive knowledge of research strategies, resources, and services
compiles annotated bibliographies
evaluates library materials to determine appropriate conservation treatment, and performs complex conservation treatments
supervises large numbers of students
resolves complex library-wide bibliographic, holdings, and circulation problems

HIGHER EDUCATION PERSONNEL BOARD

Specification for Class Class Code: 4310

LIBRARY SPECIALIST I

CLASS SERIES CONCEPT

Serve as a specialist in a specific library functional or subject area. Utilize complex automated subsystems to provide specialized information. Refer clients to other staff or librarians when appropriate.

BASIC FUNCTION

Perform complex library technical tasks using intensive application of knowledge and skills in a specific library functional area such as public services, acquisitions, cataloging, serials, interlibrary loan, special collections, and reference, or in a specific subject area such as Asian Studies, Northwest Literature, American History, and music.

DISTINGUISHING CHARACTERISTICS

Under general direction, in the area of specialization perform complex library technical tasks involving intensive application of specialized knowledge and skills such as search bibliographic or complex reference resources, perform complex cataloging of library materials with catalog copy, analyze and resolve complex order and bibliographic problems, assist clients with reference services including interpreting and conferring on research strategies, and assist in the management and preservation of the collection.

TYPICAL WORK

Perform complex cataloging of library materials with catalog copy from sources such as, Library of Congress (LC), Online Computer Library Center (OCLC), Western Library Network (WLN), National Library of Medicine (NLM), and Research Libraries Information Network (RLIN); complete and upgrade records which require classification, subject analysis, and extensive descriptive changes; correct or add subjects or classification to general copy cataloging;

Analyze and resolve complex order and bibliographic problems; maintain and update internal records using complex automated systems;

Perform bibliographic and reference searches in the area of specialization using knowledge of complex reference resources, including interpreting and conferring on reference research strategies with clients;

Inform librarians and clients of available materials and assist clients with bibliographic tools unique to the area of specialization;

Class Code: 4310

Do pre- or post-search of materials ordered or received in area of specialization; correspond with publishers and vendors; identify and resolve problems with suppliers;

Assist in the management and preservation of the library collections in the specialty area;

Analyze, organize, index, and describe materials, such as manuscripts, clippings, slides, and photographs, in area of specialization;

May recommend alteration and improvement of function or subject area routines;

May direct the work of others;

May serve as a foreign language resource person;

Perform duties of Library Technician III;

Perform related duties as required.

MINIMUM QUALIFICATIONS

High school graduation or equivalent AND four years of applicable library technical experience including one year of experience in the area of specialization

OR

equivalent education/experience.

New Class: 1-3-73
Revise Title/Class: 12-14-73
Revise Class: 7-1-81
Revise MQ: 7-2-90
Revise Class: 8-7-92

HIGHER EDUCATION PERSONNEL BOARD

Specification for Class Class Code: 4311

LIBRARY SPECIALIST II

BASIC FUNCTION

Perform original cataloging or participate in the development, cataloging, organization, and management of a specialized subject or functional library collection.

DISTINGUISHING CHARACTERISTICS

Under general direction, in the area of specialization perform complex library technical tasks involving intensive application of specialized knowledge and skills such as participate in the development and management of the library collections, perform original descriptive and subject cataloging and classification, perform and resolve complex bibliographic and reference searches.

TYPICAL WORK

Perform original descriptive and subject cataloging and classification in accordance with established cataloging rules;

Review dealers' catalogs and proposed library acquisitions plans; recommend and prioritize acquisition of library materials in specialized area;

Evaluate gift material for possible addition to specialized collection;

Develop and distribute bibliographic documentation for materials added to specialized collections;

Act as liaison with collection users, community, and the other libraries; inform clients of availability of materials added to the collection;

Provide service to clients in specialized subject area; interpret and confer on reference research strategies with clients;

Recommend changes and improvement of function or section routines and procedures;

Prepare annual, operational, and other unit reports;

Maintain budget records for areas of specialization;

May direct the work of others;

May serve as a foreign language resource person;

Class Code: 4311

Perform the duties of a Library Specialist I;

Perform related duties as required.

MINIMUM QUALIFICATIONS

High school graduation or equivalent AND five years of applicable library technical experience including two years in the area of specialization

OR

equivalent education/experience.

New Class: 12-14-73
Revise Class: 7-1-81
Revise MQ: 7-2-90
Revise Class: 8-7-92

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HIGHER EDUCATION PERSONNEL BOARD

Specification for Class Class Code: 4312

LIBRARY SPECIALIST I - SUPERVISOR

BASIC FUNCTION

Perform complex library technical tasks using intensive application of knowledge and skills in a specific library functional area such as public services, acquisitions, cataloging, serials, interlibrary loan, special collections, and reference, or in a specific subject area such as Asian Studies, Northwest Literature, American History, and music. Supervise assigned personnel.

DISTINGUISHING CHARACTERISTICS

With delegated authority, interview, and recommend selection of applicants, conduct training, assign and schedule work, act upon leave requests, conduct annual performance evaluations, and recommend disciplinary action.

Under general direction, in the area of specialization, perform complex library technical tasks involving intensive application of specialized knowledge and skills such as search bibliographic or complex reference resources, perform complex cataloging of library materials with catalog copy, analyze and resolve complex order and bibliographic problems, assist clients with reference services including interpreting and conferring on research strategies, and assist in the management and preservation of the collection.

TYPICAL WORK

Perform complex cataloging of library materials with catalog copy from sources such as Library of Congress (LC), Online Computer Library Center (OCLC), Western Library Network (WLN), National Library of Medicine (NLM), and Research Libraries Information Network (RLIN); complete and upgrade records which require classification, subject analysis, and extensive descriptive changes; correct or add subjects or classification to general copy cataloging;

Analyze and resolve complex order and bibliographic problems; maintain and update internal records utilizing complex automated systems;

Perform bibliographic and reference searches in the area of specialization using knowledge of complex reference resources, including interpreting and conferring on reference research strategies with clients;

Inform librarians and clients of available materials; assist clients with bibliographic tools unique to the area of specialization;

Do pre- or post-search of materials ordered or received in area of specialization; correspond with

Class Code: 4312

publishers and vendors; identify and resolve problems with suppliers;

Assist in the management and preservation of the library collections in the specialty area;

Analyze, organize, index, and describe materials such as manuscripts, clippings, slides, and photographs, in area of specialization;

Supervise assigned personnel; evaluate and monitor work process; recommend changes for improvement of function or section routines; develop, implement, and monitor training; develop and disseminate instructions and information; organize, conduct, and facilitate staff meetings;

May serve as a foreign language resource person;

Perform the duties of Library Technician III;

Perform related duties as required.

MINIMUM QUALIFICATIONS

High school graduation or equivalent AND four years of applicable library technical experience including one year of experience in the area of specialization and one year of lead/supervisory experience

OR

equivalent education/experience.

New Class: 8-7-92

HIGHER EDUCATION PERSONNEL BOARD

Specification for Class Class Code: 4313

LIBRARY SPECIALIST II - SUPERVISOR

BASIC FUNCTION

Perform original cataloging or participate in the development, cataloging, organization, and management of a specialized subject or functional library collection. Supervise assigned personnel.

DISTINGUISHING CHARACTERISTICS

With delegated authority, interview, and recommend selection of applicants, conduct training, assign and schedule work, act upon leave requests, conduct annual performance evaluations, and recommend disciplinary action.

Under general direction, in the area of specialization, perform complex library technical tasks involving intensive application of specialized knowledge and skills such as participate in the development and management of the library collections, perform original descriptive and subject cataloging and classification, and perform and resolve complex bibliographic and reference searches.

TYPICAL WORK

Perform original descriptive and subject cataloging and classification in accordance with established cataloging rules;

Review dealers' catalogs and proposed library acquisitions plans; recommend and prioritize acquisition of library materials in specialized area;

Evaluate gift material for possible addition to specialized collection;

Develop and distribute bibliographic documentation for materials added to specialized collections;

Provide service to clients in specialized subject area; interpret and confer on reference research strategies with clients;

Act as liaison with collection users, community, and the other libraries; inform clients of availability of materials added to the collection;

Supervise assigned personnel; evaluate and monitor work processes; recommend changes and improvement of function or section routines and procedures; develop, implement, and monitor training; develop and disseminate instructions and information; organize, conduct, and facilitate

Class Code: 4313

staff meetings;

Prepare annual, operational, and other unit reports;

Maintain budget records for area of specialization;

May serve as a foreign language resource person;

Perform the duties of a Library Specialist I - Supervisor;

Perform related duties as required.

MINIMUM QUALIFICATIONS

High school graduation or equivalent AND five years of applicable library technical experience including two years in the area of specialization and one year of lead/supervisory experience

OR

equivalent education/experience.

New Class: 8-7-92

HIGHER EDUCATION PERSONNEL BOARD

Specification for Class Class Code: 4320

LIBRARY SUPERVISOR I

BASIC FUNCTION

Supervise assigned personnel and maintain the operations of a library unit or function.

DISTINGUISHING CHARACTERISTICS

With delegated authority, interview and recommend selection of applicants, conduct training, assign and schedule work, act upon leave requests, conduct annual performance evaluations, and recommend disciplinary action.

Under general direction and within established guidelines, maintain the operations of a library unit or function.

Perform complex library technical work and problem solving using intensive application of knowledge and skills such as interpret automated and/or manual records, resolve client complaints, monitor unit budgets, and recommend changes in library unit or function procedures.

TYPICAL WORK

Supervise assigned personnel; develop, implement, and monitor training; implement and evaluate work flow priorities; develop and disseminate instructions and information to unit personnel; organize, conduct, and facilitate unit staff meetings;

Interpret and ensure compliance with organizational rules, policies, and procedures; evaluate and make authorized decisions regarding situations requiring deviation or exception from normal procedures; recommend unit policy and implement procedures; write and/or maintain procedures manuals;

Assist clients with using library resources;

Monitor assigned budgets, cash receipts, and funds;

Maintain or oversee maintenance of statistics and prepare reports such as monthly, quarterly, and annual reports;

Ensure maintenance of supply inventory; analyze equipment needs and recommend purchases; monitor equipment upkeep, service, and repair;

Monitor and oversee stacks maintenance and space allotment;

Class Code: 4320

Coordinate the work of a unit with other library units, campus departments, or non-institutional services;

May assume responsibility for unit operations in absence of supervisor;

May identify and communicate with appropriate persons regarding building security and maintenance problems;

Perform the duties of Library Technician Lead;

Perform related duties as required.

MINIMUM QUALIFICATIONS

High school graduation AND four years of library technical experience, including one year of lead and/or supervisory experience

OR

equivalent education/experience.

New Class: 1-3-73
Revise Title/Class: 3-23-78
Revise Class: 7-1-81
Revise MQ: 7-2-90
Revise Class/Title: 8-7-92

HIGHER EDUCATION PERSONNEL BOARD

Specification for Class Class Code: 4321

LIBRARY SUPERVISOR II

BASIC FUNCTION

Supervise assigned personnel and direct the operations of a large library unit, or one or more units, characterized by staff performing a variety of complex technical work or multiple functions.

DISTINGUISHING CHARACTERISTICS

With delegated authority, interview, and recommend selection of applicants, conduct training, assign and schedule work, act upon leave requests, conduct annual performance evaluations, and recommend disciplinary action.

Under general direction, within established guidelines, plan, coordinate, direct, and maintain the operations of assigned unit(s). Develop and implement unit procedures; participate in the development of library policy. Perform complex library technical work and problem solving such as mediate and resolve exceptional complaints and conflicts, participate in budget development and monitor budgets, and interpret automated and/or manual records. With delegated authority, assume responsibility for unit(s) operations on a regular basis.

TYPICAL WORK

Supervise assigned personnel; develop, implement, and monitor training; evaluate work flow and determine work flow priorities; develop, disseminate, and coordinate instructions and information; organize, conduct, and facilitate staff meetings;

Plan, implement, coordinate, maintain, and direct the operations of assigned library unit(s); regularly assume responsibility for unit(s) operations;

Develop and oversee the preparation of statistical and narrative reports;

Interpret and ensure compliance with organization rules, policies, and procedures;

Participate in the development and implementation of policies; develop and implement unit procedures; ensure maintenance of procedure manuals; evaluate and make decisions regarding situations requiring deviation or exception from normal procedures;

Prepare budget requests and monitor assigned budgets; monitor cash receipts and funds;

Class Code: 4321

Coordinate the work of a unit with other library units, campus departments, or non-institutional services;

Plan for equipment needs of units; oversee equipment upkeep, service and repair; ensure maintenance of supply inventory; plan, monitor, and control stacks maintenance and library space allotment;

Assist clients with using library resources;

Perform the duties of Library Supervisor I;

Perform related duties as required.

MINIMUM QUALIFICATIONS

High school graduation or equivalent AND five years of library technical experience, including two years of lead/supervisory experience

OR

equivalent education/experience.

New Class: 3-7-73
Revise Class: 11-14-74
Revise Class/Title: 3-23-78
Revise Class: 7-1-81
Revise MQ: 7-2-90
Revise Class/Title: 8-7-92

HIGHER EDUCATION PERSONNEL BOARD

Specification for Class Class Code: 4325

LIBRARY TECHNICIAN I

CLASS SERIES CONCEPT

Perform library technical tasks related to public and/or technical services using manual and/or automated systems. Refer clients to other staff or librarians when appropriate.

BASIC FUNCTION

Perform elementary library technical tasks in support of the overall library function.

DISTINGUISHING CHARACTERISTICS

Under direct supervision, using manual and/or automated systems, perform elementary library technical tasks such as answer elementary library informational and directional questions such as library hours and locations and questions regarding information contained in the technical services and public catalog systems, search for library materials reported missing, maintain records of items missing and in need of repair or rebinding, interfile cards and/or input information into an established card or automated catalog or other filing system, and prepare cataloged and uncataloged library materials for circulation.

TYPICAL WORK

Answer elementary library informational and directional questions; answer questions regarding information contained in the technical services and public catalog systems, refer clients to appropriate employees for other services;

Search for library materials reported missing; maintain records of items missing or in need of repair or rebinding; gather items for bindery/mendery;

Assist in stack maintenance such as shelving library materials and shelf reading;

Assist clients or other library units with locating, retrieving, and checking out specific library materials;

Type and proofread catalog cards and other library records;

Interfile author, title, and subject cards into an established card catalog or other filing system and/or input information into an established automated catalog system;

Answer telephones; take messages; photocopy materials; maintain copy equipment by adding

Class Code: 4325

toner and paper and releasing paper jams; record statistics;

Sort and pre-search requests for purchase of library materials; prepare and route purchase request forms; maintain records and inventories of items received from publishers and vendors;

Stamp, mark, and sensitize library materials;

Maintain various files such as circulation and reserve files;

Sort and mail overdue and billing notices; prepare and release holds on student records; receive and record payments;

Assist clients with the library's audio-visual and computer equipment which supports non-print materials and machine readable data products such as microform reader-printers and CD-ROM readers;

May perform elementary gift processing;

Perform related duties as required.

MINIMUM QUALIFICATIONS

High school graduation or equivalent AND six months of experience in a library or closely related clerical activity, or satisfactory completion of relevant course work

OR

equivalent education/experience.

New Class: 1-3-73
Revise Class: 5-17-73
Revise Class: 7-1-81
Revise Class: 8-7-92

HIGHER EDUCATION PERSONNEL BOARD

Specification for Class Class Code: 4326

LIBRARY TECHNICIAN II

BASIC FUNCTION

Perform routine library technical tasks in support of the overall library function.

DISTINGUISHING CHARACTERISTICS

Under general supervision, using manual and/or automated systems, perform routine library technical tasks such as assist clients with recurring quick information and routine reference questions on general subjects and in the use of basic bibliographic tools, prepare bibliographic listings of assigned subject matter, verify bibliographic information using print, non-print or automated sources, process and maintain records, and maintain operations of a public service desk.

TYPICAL WORK

Assist clients with recurring quick information and routine reference questions on general subjects, and in the use of basic bibliographic tools; refer clients to appropriate employees for other services;

Prepare bibliographic listings of assigned subject matter, using standard bibliographies, indexes, catalog systems, and abstract services; verify bibliographic information using print, non-print or automated sources;

Process and maintain automated and/or manual records such as acquisition, cataloging, serials, circulation, and reserve records;

Update catalog records such as add holdings and change locations; check manual and/or automated systems for name and subject authorities and report conflicting entries; interfile author, title, and subject cards into an established card catalog or filing system; input information into an automated catalog system;

Assist clients at public service desk(s); explain library procedures, rules, and service policy;

Process library materials which includes verifying bibliographic entry, checking in, and processing replacement orders, discards and withdrawals;

Process added copies/volumes; prepare cataloged, uncataloged, and reserve materials for circulation; search, distribute, and maintain records of uncataloged and reserve materials;

Class Code: 4326

Search manual and/or automated sources for availability of library materials; search for materials reported missing;

Perform interlibrary loan borrowing and lending procedures; perform basic searching for bibliographic and location information;

Process requests for acquisitions; type or input orders; verify accuracy of materials received; maintain records and inventories of items received from publishers, vendors, and donors;

Input catalog records into local, regional, national or international databases; perform routine checking of computer coding on records using specific knowledge of appropriate machine readable coding;

Record and maintain statistics; compile routine reports such as circulation, interlibrary loan, and reference statistics;

Maintain periodical and other serial subscriptions; initiate renewals as subscriptions expire; process claims;

Maintain ongoing operations of public service desks including opening and closing procedures;

Assist clients and other library units with locating, retrieving, and checking out specific library materials;

Prepare, sort, and mail overdue, recall, and billing notices; prepare and release holds on student records; compute fine amounts, receive and record payments; maintain fiscal records;

Process gifts and materials received on exchange from other libraries;

Assist clients with the library's audio-visual and computer equipment which support non-print materials and machine readable data products such as microform reader-printers and CD-ROM readers;

Perform routine tasks such as typing, filing, answering phones, making photocopies, and sorting and distributing mail;

Perform simple maintenance such as adding paper and toner, releasing paper jams, and dusting, on equipment such as copy machines, collection use equipment, typewriters, telefaxsimile, computers, and printers;

Prepare and process items to send to bindery/mendery, microfilming, etc; review returned items for quality control;

Class Code: 4326

Type, proofread and revise catalog cards and other library records;

May direct the work of others;

May perform basic library materials repair;

May compose and prepare correspondence pertaining to library functions;

May prepare orders for supplies and equipment;

Perform the duties of Library Technician I;

Perform related duties as required.

MINIMUM QUALIFICATIONS

High school graduation or equivalent AND one year of library technical experience or closely related activity, or satisfactory completion of relevant course work

OR

equivalent education/experience.

New Class: 1-3-73
Revise Class: 5-17-73
Revise Class: 7-1-81
Revise MQ: 7-2-90
Revise Class: 8-7-92

HIGHER EDUCATION PERSONNEL BOARD

Specification for Class Class Code: 4327

LIBRARY TECHNICIAN III

BASIC FUNCTION

Perform complex library technical tasks in support of the overall library function.

DISTINGUISHING CHARACTERISTICS

Under general supervision, using manual and/or automated systems, perform complex library technical tasks such as assist clients with general reference and bibliographic questions using basic tools, perform complex circulation and collection maintenance functions, search and verify library materials orders and receipts, locate and revise catalog copy, input/update complex library records, and maintain the operations of a library unit.

TYPICAL WORK

Assist clients with general reference and bibliographic questions using basic tools; refer clients to appropriate employees for other services;

Search and verify library material orders and receipts, using manual and/or automated systems, catalogs of the Library of Congress, the National Union Catalog, and other bibliographic sources;

Prepare and/or interpret bibliographic listings using bibliographies, indexes, catalog systems, and abstract services; verify complex bibliographic information using print, non-print, or automated sources;

Catalog library materials using close catalog copy from sources such as Library of Congress (LC), Online Computer Library Center (OCLC), Cataloging in Publication (CIP), Western Library Network (WLN), National Library of Medicine (NLM), Research Libraries Information Network (RLIN); transcribe information onto a work sheet for review;

Identify, verify and process complex added copies/volumes or reserve materials; input and/or revise catalog records in local, regional, national, or international databases using specific knowledge of appropriate cataloging rules, machine readable coding, and local practice; maintain complex holdings records;

Input and/or process library material orders, purchase orders, and invoices utilizing local, regional, or national databases using specific knowledge of rules and codes;

Arrange, index, and inventory special materials such as manuscripts, newspapers, clippings, slides, and photographs for bibliographic control;

Class Code: 4327

Assist clients at public service desk(s); interpret and explain library procedures, rules, and service policy;

Assist clients and other library units with locating, retrieving, and checking out library materials;

Order replacement materials; discard and withdraw items identified as not needed for collections; reinstate and relocate materials;

Perform complex circulation services; make authorized decisions regarding exceptional circumstances such as waiver of fines, exceptions to normal policy, waiver of limitations, and interpretation of policies; prepare library evidence for appeals of library fines;

Initiate and answer specified correspondence resolving special problems or inquiries; compile and prepare reports;

Perform complex gift processing; maintain exchange agreements; assist in donor relations;

Perform interlibrary loan borrowing and lending procedures; perform complex bibliographic and location verification; search citations with problems;

Direct the work of others;

Assist clients with the library's audio-visual and computer equipment which support non-print materials and machine readable data products such as microform reader-printers and CD-ROM readers;

Maintain periodical and other serial subscriptions; initiate renewals as subscriptions expire; process claims; maintain serial records;

Identify, recommend, and prepare library materials for bindery/mendery; maintain complex bindery records;

Monitor and control stacks maintenance;

May collect fees, process cash receipts, make deposits, and maintain fiscal records;

Perform the duties of Library Technician II;

Perform related duties as required.

Class Code: 4327

MINIMUM QUALIFICATIONS

High school graduation or equivalent AND three years of applicable library technical experience, including one year beyond the entry level

OR

equivalent education/experience.

New Class: 1-3-73
Revise Class: 5-17-73
Revise Class: 7-1-81
Revise MQ: 7-2-90
Revise Class: 8-7-92

HIGHER EDUCATION PERSONNEL BOARD

Specification for Class Class Code: 4328

LIBRARY TECHNICIAN LEAD

BASIC FUNCTION

Lead assigned staff and perform complex library technical tasks in support of the overall library function.

DISTINGUISHING CHARACTERISTICS

Regularly assign, instruct, and check the work of others.

Under general supervision, using manual and/or automated systems, perform complex library technical tasks such as assist clients with general reference and bibliographic questions using basic tools, perform complex circulation and collection maintenance functions, search and verify library material orders and receipts, locate and revise catalog copy, input/update complex library records, and maintain the operations of a library unit.

TYPICAL WORK

Lead assigned personnel in the operations and support of a library unit; recommend changes and improvement of unit routines or procedures; evaluate and monitor work processes;

Assist clients with general reference and bibliographic questions using basic tools; refer clients to appropriate employees for other services;

Search and verify library material orders and receipts, using manual and/or automated systems, catalogs of the Library of Congress, the National Union Catalog, and other bibliographic sources;

Prepare and/or interpret bibliographic listings using bibliographies, indexes, catalog systems, and abstract services; verify complex bibliographic information using print, non-print, or automated sources;

Catalog library materials using close catalog copy from sources such as Library of Congress (LC), Online Computer Library Center (OCLC), Cataloging in Publication (CIP), National Library of Medicine (NLM), Research Libraries Information Network (RLIN), and Western Library Network (WLN); transcribe information onto a work sheet for review;

Identify, verify, and process complex added copies/volumes or reserve materials; input and/or revise catalog records in local, regional, national, or international databases using specific knowledge of appropriate cataloging rules, machine readable coding, and local practice; maintain complex holdings records;

Class Code: 4328

Input and/or process library materials orders, purchase orders, and invoices utilizing local, regional, or national databases using specific knowledge of rules and codes;

Arrange, index, and inventory special materials such as manuscripts, newspapers, clippings, slides, and photographs for bibliographic control;

Assist clients at public service desk(s); interpret and explain library procedures, rules, and service policy;

Assist clients and other library units with locating, retrieving, and checking out materials;

Order replacement materials; discard and withdraw items identified as not needed for collections; reinstate and relocate materials;

Perform complex circulation services; make authorized decisions regarding exceptional circumstances such as waiver of fines, exceptions to normal policy, waiver of limitations, and interpretation of policies; prepare library evidence for appeals of library fines;

Initiate and answer specified correspondence resolving special problems or inquiries; compile and prepare reports;

Perform complex gift processing; maintain exchange agreements; assist in donor relations;

Perform interlibrary loan borrowing and lending procedures; perform complex bibliographic and location verification; search citations with problems;

Assist clients with the library's audio-visual and computer equipment which support non-print materials and machine readable data products such as microform reader-printers and CD-ROM readers;

Maintain periodical and other serial subscriptions; initiate renewals as subscriptions expire; process claims; maintain serial records;

Identify, recommend, and prepare library materials for bindery/mendery; maintain complex bindery records;

Monitor and control stacks maintenance;

May collect fees, process cash receipts, make deposits, and maintain fiscal records;

Perform the duties of Library Technician III;

Perform related duties as required.

Class Code: 4328

MINIMUM QUALIFICATIONS

High school graduation or equivalent AND three years of applicable library technical experience, including one year beyond the entry level

OR

equivalent education/experience.

New Class: 8-7-92

JOB DESCRIPTION/QUESTIONNAIRE ADDENDUM FORM
WASHINGTON UNIVERSITY LIBRARIES MARCH 1997

JOB TITLE: **DEPARTMENT:**

CLASSIFICATION: **PREPARED BY:**

INCUMBENT: **DATE:**

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FOLLOWING ARE THE CATEGORIES TO INCLUDE ON THE ADDENDUM FORM. IF THE CATEGORY DOES NOT APPLY TO THE POSITION, PLEASE INDICATE N/A TO LET US KNOW THAT ITS NOT APPLICABLE. THANK YOU.

SUMMARY/OVERALL PURPOSE:
If this was not filled in on the original job description, please describe in one or two sentences the major purpose, objective, or function of the position and the end results it is intended to accomplish within the unit or department.

DECISION-MAKING AND IMPACT
Decisions - Please describe the kinds of decisions the position makes as part of the regular job duties. What interpretation of information and judgment is required? What kinds of decisions are referred to the supervisor?

Impact - Then describe the impact of these decisions made during the performance of regular job duties. Please clarify if the decisions affect a) only the person's job; b) others within the same work unit or department; c) across departments yet in the same division or school; d) across major divisions or schools; and/or e) a university-wide impact.

CONTACTS
Internal - Describe the nature, purpose, importance and frequency (i.e. per day, week, month) of contacts inside the University. Casual, incidental or infrequent contacts should not be considered. Indicate only those contacts of a regular and recurring nature and where there is a responsibility to influence others to take a course of action.

External - Same as above, describe contacts outside the University.

SUPERVISION GIVEN
List the number and types of employees that this position directly supervises.

SUPERVISION RECEIVED
Describe how this position's work or results are reviewed by the supervisor.

FINANCIAL IMPACT
Provide numerical information which defines the degree of financial accountability related to the position (e.g. annual budget of $500,00). Please indicate the nature of the responsibility such as prepares or administers budgets.

WORKING CONDITIONS
State where the work is performed, i.e., office, laboratory, several different facilities, and briefly describe the physical surroundings in which the incumbent works. This includes such items as the physical requirements of the job, necessary travel, unusual work hours and/or unusual environmental conditions.

ADDITIONAL INFORMATION
Please describe any other information about the position that you consider important that is not included in any of the previous categories.

Thank you for completing this additional information.

Olin Library
Compensable Factor(s)

1. Supervision received and independent judgment
   - on own without supervision
     20% or more of time

2. Customer contact with <u>all</u> types of patrons providing information from a variety of resources and databases

3. Library computer search/technical skills

   OCLC
   NOTIS/ILS/Triple I
   World Windows/Internet
   Email Systems

4. Other related computer skills

   Dialogue
   CD Rom Network on Abstracts
   Excel or Lotus Spreadsheets
   Information Databases
   Vendor Databases
   Word Processing

5. Any outstanding factor(s) such as:

   (A) Overall impact of decisions made (e.g. - affect entire facility)
   (B) Breadth of knowledge (departmental & reference library assistants)
   (C) Supervision & budget responsibilities with student assistants (departmental library assistants)

Compensable Factor(s)	Original & Adaptive Cataloguing	Serials	Reference	Departmental
Overall purpose of unit		Search verify & propose bibliog. information	(1) assist all patrons (2) educate Univ. patron on how to use resources & databases	Responsible for all daily operations of dept. library
Major duties	Search verify & prepare bibliog. info for cataloguing Reviews new items coming into unit	Assists with ordering, receiving, recording & payment of serial materials	50% Help Desk 30% assist Ref. Librarians with bibliographic tasks such as searching & preparing book orders	Stand alone operation with full range of library services
Knowledge			4 years college	Bachelor's degree
Library Computer Search/Technical Skills	OCLC Notis	OCLC Notis	OCLC NOTIS/ILS/Triple I World Windows Internet E-Mail	World Windows Internet World Wide Web
Other Computer/PC Skills		Downloads bibliog. references	Dialogue CD Rom Network on abstracts Excel or Lotus Info Databases Word processing	
Indep. Judgement & Decisions	Receives all new items & determines amount of verification needed	Must recognize diverse items & determine which guidelines to use	When to refer patron questions or computer problems; computers are down 10-30% of time	Policy & Procedure decisions in absence of supervisor 25-35% of time
Impact of Decisions & Frequency	-	-	Checks & troubleshoots 30 terminals/computer workstations	
Patron/Customer Contacts and Vendor Contacts	Staff within unit	Staff within unit and in other library units	public/patron contact 50% at Help Desk (all patrons)	50% reference work provide info & assistance
Employees supervised	-	-	None regularly	6-12 student assistants
Financial Impact and/or Univ. Impact	-		Quality of reference services	$10-20,000 student budget
Impact of Error			Customer services and quality of reference services	
Supervision Received	-	-	On own 20% of time	20-35% of on own time
Compensation Comments	OK as is - Grade 5	OK as is - Grade 5	Grade 5/6 ♦ On own ♦ All patrons/ customer contact ♦ Library Search skills ♦ Computer skills	Grade 6 ♦ On own 20% ♦ Customer contact ♦ Breadth of knowledge ♦ Supervision and budget for students

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Compensable Factor(s)	Circulation (Eve & Weekend)	Interlibrary Loan	Order Unit	Accounting
Overall purpose of unit	Evening & weekend supervision	Processing, borrowing or lending requests		
Major Duties	Resp for security of patrons, staff, facility & general circulation	60% locate items bibliographically Search, verify & prepare borrowing requests	Verify biblio. information Search & create biblio. records in ILS	Processes invoices for payment 60% 20% process purchase orders & interdept. orders
Knowledge	Bachelor's degree	4 years college		2 years college
Library Computer Search/Technical Skills		OCLC	OCLC ILS/Notis E-mail	
Other Computer/PC Skills	Circulation System	Telephone, fax & mail	FIS Vendor Databases Windows 95 DOS Commands Download from OCLC into Notis Excel Spreadsheets	FIS entries
Indep. Judgement & Decisions		Rush requests from patrons; selection of lenders	Decide on approp. vendor to use	Monitors library accounts for fund balances
Impact of Decisions & Frequency	In charge of entire library on evenings/weekends	Cost effective Selection of vendors	Decisions re: bibliographic comparisons & vendors	Contact supervisor when funds are not available
Patron/Customer/ Vendor Contacts	All types of patrons on evening/weekends	Faculty & students	Internal customers are bibliographers Order & receive materials from vendors	Internal - Accts. Payable and all library units
Employees Supervised	2-3 students			
Financial Impact and/or Univ. Impact	Resp. for protection of collections			Monthly reports for bibliographers on their budgets
Impact of Error	In charge of entire library facility, patrons, staff and collections evenings/weekends			
Supervison Received	On own time 20-50% of time	-	-	-
Compensation Comments	Grade 6 ♦ On own and Overall impact ♦ Customer contact ♦ Unique responsibilities	OK as is - Grade 5	♦ Library/ computer research skills ♦ Other related PC skills	

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SYSTEMS AND PROCEDURES EXCHANGE CENTER

SELECTED RESOURCES

ASSOCIATION OF RESEARCH LIBRARIES
OFFICE OF LEADERSHIP AND MANAGEMENT SERVICES

Books and Journal Articles

Henderson, Richard I., and Kitty Williams Clarke. *Job Pay for Job Worth: Designing, Managing, and Involving Employees in an Equitable Job Classification System*. 2nd ed. Atlanta: Georgia State University Business Press, 1994.

Black, William K., comp. *Job Analysis in ARL Libraries*. SPEC Kit 135. Washington, D.C.: ARL Office of Leadership and Management Services, 1987.

Job Evaluation. Geneva: International Labour Office, 1986.

Manese, Wilfredo R. *Occupational Job Evaluation: A Research-based Approach to Job Classification*. New York: Quorum Books, 1988.

Mosley, Shelley. "How to Survive a Classification Study." *Library Journal* 123, no. 17 (1998): 48-9.

Mugnier, Charlotte. *The Paraprofessional and the Professional Job Structure*. Chicago: American Library Association, 1980.

Wells, H. Lea, comp. *Personnel Classification Systems in ARL Libraries*. SPEC Kit 85. Washington, D.C.: ARL Office of Leadership and Management Services, 1982.

Task Analysis Survey Instrument: Definitions of Terms, Checklist of Duties, Status Profile Sheet. Chicago: American Library Association, 1969.

Websites

California State Civil Service. "Job Descriptions and Statistical Information." 19 July 1999. <http://www.spb.ca.gov/wwwcp1.htm>.

Colorado Department of Personnel. "State of Colorado Class Series Description: Library Technician." 1 September 1993. <http://www.state.co.us/gov_dir/gss/hr/products/class/cds/occgrp/g-asr/g3c1-4.htm>.

Economic Research Institute. "Listing of Available Salary Surveys." September 1999. <http://www.erieri.com/cgi-bin/alsurvey.cgi>.

Human Resources, Stanford University. "Compensation & Job Classification: Classification of Staff Jobs." 29 January 1999. <http://hrweb.stanford.edu/compensation/classfyjobs.html>.

Library Support Staff Resource Center, University of Rochester. "Library Paraprofessional Job Classifications and Descriptions." 12 August 1999. <http://www.lib.rochester.edu/ssp/overview/jobdescr.htm>.

Louisiana Department of State Civil Service. "Job Specifications." 26 July 1999. <http://www.dscs.state.la.us/ClassPay/Jobspecs/CSJOBSPC.HTM>.

Michigan State University Human Resources. "Classification Search." November 1999. <http://www.hr.msu.edu/Depts/comp/classpec.asp>. Classification descriptions for library assistants at Michigan State University can be searched by entering "library assistant" in the search field and pressing the "Search for Titles" button.

University Human Resources, Indiana University Bloomington. "Support Staff Job Specifications." 20 October 1998. <http://chip.hrm.indiana.edu/Class/ssjs.html>.

University of Delaware Human Resources. "Salaried Staff Descriptions, Library Family: Library Technician." 28 June 1999. <http://www.udel.edu/EMPSERVICE/SALSTAFF/SSDESC1/3libtech.html>.

University Personnel Services at University of Florida. "Classification and Compensation: Frequently Used Resources." 5 October 1999. <http://www.ups.ufl.edu/cc/frequent.htm>. Includes USPS classification specifications, A&P classification specifications, and definitions of terms used in classification specifications.

SPEC KIT ORDER FORM

QTY	TITLE		QTY	TITLE		QTY	TITLE	
				SP221	Evol & Status of Approval Plans		SP161	Travel Policies
				SP220	Internet Training		SP160	Preservation Org & Staff
				SP219	TL 2: Geographic Info Systems		SP159	Admin of Lib Computer Files
				SP218	Info Technology Policies		SP158	Strategic Plans
				SP217	TL 1: Electronic Reserves		SP157	Fee-based Services
				SP216	Role of Libs in Distance Ed		SP156	Automating Authority Control
				SP215	Reorg & Restructuring		SP155	Visiting Scholars / Access
				SP214	Digit Tech for Preservation		SP154	Online Biblio Search
				SP213	Tech Svcs Workstations		SP153	Use of Mgt Statistics
				SP212	Non-Librarian Professionals		SP152	Brittle Books Program
				SP211	Library Systems Office Org		SP151	Qualitative Collect Analysis
				SP210	Strategic Planning		SP150	Bldg Security & Personal Safety
				SP209	Library Photocopy Operations		SP149	Electronic Mail
				SP208	Effective Library Signage		SP148	User Surveys
				SP207	Org of Collection Develop		SP147	Serials Control / Deselection
				SP206	Faculty Organizations		SP146	Lib Dev Fund Raising Capabilit
				SP205	User Surveys in ARL Libs		SP145	Lib Publications Programs
				SP204	Uses of Doc Delivery Svcs		SP144	Building Use Policies
				SP203	Reference Svc Policies		SP143	Search Proced Sr LibAdmin
				SP202	E-journals / Issues & Trends		SP142	Remote Access Online Cats
				SP201	E-journals / Pol & Proced		SP141	Approval Plans
				SP200	2001: A Space Reality		SP140	Performance Appraisal
				SP199	Video Collect & Multimedia		SP139	Performance Eval: Ref Svcs
				SP198	Automating Preserv Mgt		SP138	University Copyright
				SP197	Benefits / Professional Staff		SP137	Preservation Guidelines
				SP196	Quality Improve Programs		SP136	Managing Copy Cataloging
				SP195	Co-op Strategies in Foreign Acqs		SP135	Job Analysis
				SP194	Librarian Job Descriptions		SP134	Planning Mgt Statistics
				SP193	Lib Develop & Fundraising		SP133	Opt Disks: Storage & Access
	SP252	Supprt Staff Classifictn Studies		SP192	Unpub Matls / Libs, Fair Use		SP132	Library-Scholar Communication
	SP251	Electronic Reference Service		SP191	Prov Pub Svcs Remote User		SP131	Coll Dev Organization
	SP250	TL10: Educating Faculty		SP190	Chang Role of Book Repair		SP130	Retrospective Conversion
	SP249	Catalogng of Resrces Digitized		SP189	Liaison Svcs in ARL Libs		SP129	Organization Charts
	SP248	Licensing of Electronic Prodcts		SP188	Intern, Residency & Fellow		SP128	Systems File Organization
	SP247	Management of Lib Security		SP187	ILL Trends / Staff & Organ		SP127	Interlibrary Loan
	SP246	Web Page Devel & Managmnt		SP186	Virtual Library		SP126	Automated Lib Systems
	SP245	Electronic Reserves Operations		SP185	System Migration		SP125	Tech Svcs Cost Studies
	SP244	TL 9: Renovatn & Reconfigurtn		SP184	ILL Trends / Access		SP124	Barcoding of Collections
	SP243	TL 8: Users with Disabilities		SP183	Provision of Comp Print Cap		SP123	Microcomp Software Policies
	SP242	Library Storage Facilities		SP182	Academic Status for Libns		SP122	End-User Search Svcs
	SP241	Gifts and Exchange Function		SP181	Perf Appr of Collect Dev Libn		SP121	Bibliographic Instruction
	SP240	Marketing and PR Activities		SP180	Flexible Work Arrangemts		SP120	Exhibits
	SP239	Mentoring Programs in ARL		SP179	Access Services Org & Mgt		SP119	Catalog Maintenance Online
	SP238	ARL GIS Literacy Project		SP178	Insuring Lib Colls & Bldgs		SP118	Unionization
	SP237	Managing Food and Drink		SP177	Salary Setting Policies		SP117	Gifts & Exchange Function
	SP236	TL 7: E Theses / Diss		SP176	Svcs for Persons w / Disabilities		SP116	Organizing for Preservation
	SP235	Collaborative Coll Managmnt		SP175	Scholarly Info Centrs		SP115	Photocopy Services
	SP234	TL 6: Distance Learning		SP174	Expert Systems		SP114	Binding Operations
	SP233	ARL in Extension / Outreach		SP173	Staff Recognition Awards		SP113	Preservation Education
	SP232	Use of Teams in ARL		SP172	Information Desks		SP112	Reorg of Tech and Pub Svcs
	SP231	Cust Service Programs in ARL		SP171	Training of Tech Svc Staff		SP111	Cooperative Collection Dev
	SP230	Affirmative Action in ARL		SP170	Organization Charts		SP110	Local Cataloging Policies
	SP229	Evaluating Acad Libr Dirs		SP169	Mgt of CD-ROM		SP109	Staff Training for Automation
	SP228	TL 5: Preserving Digital Info		SP168	Student Employment		SP108	Strategic Planning
	SP227	Org of Doc Coll & Svcs		SP167	Minority Recruitment		SP107	University Archives
	SP226	TL 4: After the User Survey		SP166	Materials Budgets		SP106	Electronic Mail
	SP225	Partnerships Program		SP165	Cultural Diversity		SP105	Nonbibliographic Dbases
	SP224	Staff Training & Development		SP164	Remote Storage		SP104	Microcomputers
	SP223	TL 3: Electronic Scholarly Pubn		SP163	Affirmative Action		SP103	Asst / Assoc Dir Position
	SP222	Electronic Resource Sharing		SP162	Audiovisual Policies		SP102	Copyright Policies

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QTY	TITLE		QTY	TITLE		QTY	TITLE	
____	SP101	User Studies	____	SP067	Affirm Action Programs	____	SP033	Intergrat Nonprint Media
____	SP100	Collection Security	____	SP066	Planning Preserv of Lib Materials	____	SP032	Prep, Present Lib Budget
____	SP099	Branch Libraries	____	SP065	Retrospective Conversion	____	SP031	Allocation of Resources
____	SP098	Telecommunications	____	SP064	Indirect Cost Rates	____	SP030	Support Staff, Student Assts
____	SP097	Building Renovation	____	SP063	Collective Bargaining	____	SP029	Systems Function
____	SP096	Online Catalogs	____	SP062	Online Biblio Search Svcs	____	SP028	Gifts & Exchange Function
____	SP095	Lib Materials Cost Studies	____	SP061	Status of Librarians	____	SP027	Physical Access
____	SP094	Fund Raising	____	SP060	Lib Materials Cost Studies	____	SP026	Bibliographic Access
____	SP093	User Instructions for Online Cats	____	SP059	Microform Collections	____	SP025	User Statistics and Studies
____	SP092	Interlibrary Loan	____	SP058	Goals & Objectives	____	SP024	User Surveys
____	SP091	Student Assistants	____	SP057	Special Collections	____	SP023	Grievance Policies
____	SP090	Integrated Lib Info Systems	____	SP056	External Communication	____	SP022	Private Foundations
____	SP089	Tech Svcs Cost Studies	____	SP055	Interni Com/Staff & Superv Role	____	SP021	Paraprofessionals
____	SP088	Corporate Use of Research Libs	____	SP054	Internal Com/Policies & Proced	____	SP020	Managerial Technical Specialists
____	SP087	Collect Descript/Assessment	____	SP053	Performance Appraisal	____	SP019	Staff Allocations
____	SP086	Professional Development	____	SP052	Cost Studies & Fiscal Plan	____	SP018	Staff Development
____	SP085	Personnel Classification Sys	____	SP051	Professional Development	____	SP017	Library Instruction
____	SP084	Public Svcs Goals & Objectvs	____	SP050	Fringe Benefits	____	SP016	Reclassification
____	SP083	Approval Plans	____	SP049	Use of Annual Reports	____	SP015	Goals & Objectives
____	SP082	Document Delivery Systems	____	SP048	External Fund Raising	____	SP014	Performance Review
____	SP081	Services to the Disabled	____	SP047	Automated Cataloging	____	SP013	Planning Systems
____	SP080	Specialty Positions	____	SP046	Plan Future of Card Catalog	____	SP012	Acquisition Policies
____	SP079	Internships/Job Exchanges	____	SP045	Changing Role Personnel Officer	____	SP011	Collection Development
____	SP078	Recruitment-Selection	____	SP044	Automated Acquisitions	____	SP010	Leave Policies
____	SP077	Use of Small Computers	____	SP043	Automated Circulation Sys	____	SP009	Tenure Policies
____	SP076	Online Biblio Search Svcs	____	SP042	Resource Sharing	____	SP008	Collective Bargaining
____	SP075	Staff Development	____	SP041	Collection Assessment	____	SP007	Personnel Class Schemes
____	SP074	Fees for Services	____	SP040	Skills Training	____	SP006	Friends of the Lib Organization
____	SP073	External User Services	____	SP039	Remote Storage	____	SP005	Performance Review
____	SP072	Executive Review	____	SP038	Collection Dev Policies	____	SP004	Affirmative Action
____	SP071	User Surveys: Eval of Lib Svcs	____	SP037	Theft Detection & Prevent	____	SP003	A Personnel Organization
____	SP070	Preservation Procedures	____	SP036	Allocation Materials Funds	____	SP003	Status of Librarians
____	SP069	Prep Emergencies/Disasters	____	SP035	Preservation of Lib Materials	____	SP002	Personnel Survey (flyer only)
____	SP068	AACR2 Implement Studies	____	SP034	Determin Indirect Cost Rate	____	SP001	Organization Charts

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